BEACON North Carolina
Office of the State Controller

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Manager Self-Service

Welcome to the Manager Self Service (MSS) Course

To start the course, click on the **Next** button below

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Course Objectives

This course provides you with the terms, concepts, knowledge, and skills associated with using the Manager Self Service (MSS) part of the BEACON system.

Upon completion of this course, you should be able to:

- Log on and navigate Manager Self Service (MSS)
- View employee information
- View the Reminder of Dates service
- Find help working with MSS

If you are a manager who approves leave time and time sheets or supervises shift employees, you should be able to:

- Review and approve leave requests
- Review and approve time sheets
- Create and maintain shift substitutions

Course Duration: 1.5 Hours

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Prerequisites

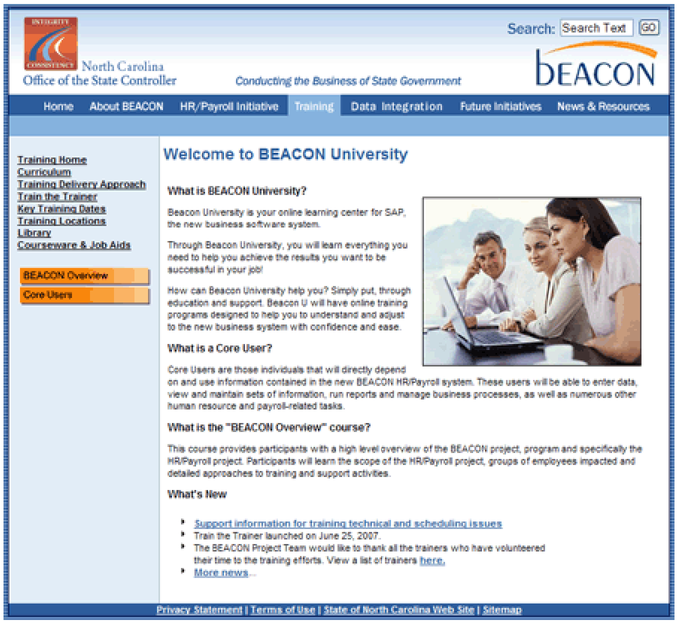
The prerequisites for this course are these online courses:

- Employee Self Service Introduction (ES 200)
- Time Entry (ES 210)

If you have not yet taken those courses, go to BEACON University to learn how to complete them.

BEACON University:

http://www.beacon.nc.gov/training/index.html


Search: Search Text GO
North Carolina Office of the State Controller
Conducting the Business of State Government
BEACON
Home
About BEACON
HR/Payroll Initiative
Training
Data Integration
Future Initiatives
News & Resources
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Curriculum
Training Delivery Approach
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Key Training Dates
Training Locations
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Courseware & Job Aids
BEACON Overview
Core Users
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Welcome to BEACON University

What is BEACON University?

Beacon University is your online learning center for SAP, the new business software system.

Through Beacon University, you will learn everything you need to help you achieve the results you want to be successful in your job!

How can Beacon University help you? Simply put, through education and support. Beacon U will have online training programs designed to help you to understand and adjust to the new business system with confidence and ease.

What is a Core User?

Core Users are those individuals that will directly depend on and use information contained in the new BEACON HR/Payroll system. These users will be able to enter data, view and maintain sets of information, run reports and manage business processes, as well as numerous other human resource and payroll-related tasks.

What is the "BEACON Overview" course?

This course provides participants with a high level overview of the BEACON project, program and specifically the HR/Payroll project. Participants will learn the scope of the HR/Payroll project, groups of employees impacted and detailed approaches to training and support activities.

What's New

- Support information for training technical and scheduling issues
- Train the Trainer launched on June 25, 2007.
- The BEACON Project Team would like to thank all the trainers who have volunteered their time to the training efforts. View a list of trainers here.
- More news...

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Before You Begin

This self-paced course includes interactive elements that contribute to your knowledge acquisition. These elements can include:

- Knowledge checks
- Interactive activities

Pages with interactions include a mouse icon to identify an interaction on the page. Instructions appear next to the icon that tell you what action to take.

This course has been optimized for the Internet Explorer (IE) browser and a screen resolution of 1024 by 768. Refer to the BEACON Library for instructions on how to change your monitor settings. For the best learning experience, verify that you are viewing this course in IE 6 or above at 1024 by 768 screen resolution. Additionally, the best way to view this course is in full screen mode. Increase your browser window to full screen size if it is not already by using the F11 key on your keyboard. Press the F11 key again to return to regular view for printing or other standard functions. If your F11 key does not function this way, go to View on the IE tool bar and select Full Screen. To get back to regular view, move your mouse pointer to the top of the screen until the top of the browser window reappears and select the restore icon at the top right of the browser window.

In this section, you should learn more about these interactive elements.

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North Carolina
Office of the State Controller

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Knowledge Check

The knowledge check screen is a quick quiz that helps reinforce the key points you’ve just learned.

When you answer a knowledge check question, you receive immediate feedback (and the correct answer if you picked the wrong response).

These knowledge checks are not graded or scored; they serve only to provide you with a self-assessment.

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Office of the State Controller

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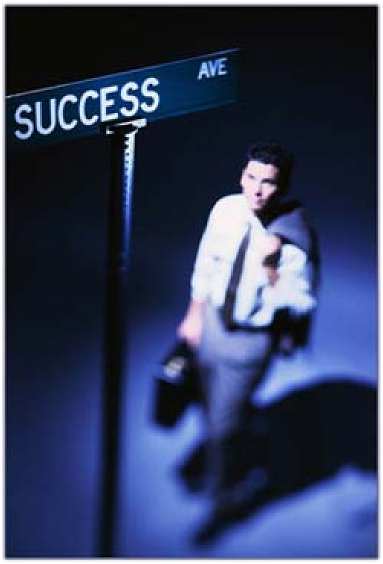
Manager Self-Service

One Last Word



We recommend that you complete the modules in the order in which they are listed on the home page because each module builds upon information that is presented in earlier modules.

We also recommend that you plan on taking the training when you will have minimal interruptions and a quiet environment. Often, first thing in the morning or lunchtime are quiet times. Other learners prefer to take the training after hours. You can choose to access the training from your home PC.

You’re ready to begin!

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Course Lessons

The **Manager Self Service** course is divided into six lessons. Three are for **all managers**, and three are for managers who **approve hours and leave time for employees or supervise shift workers**.

To go to a specific lesson, click its button, otherwise, click the **Next** button below to begin Lesson 1.

For all managers:

Lesson 1: MSS Overview
Lesson 2: My Team
Lesson 3: Finding Help

For managers who approve hours, leave time, or supervise shift employees:

Lesson 4: Approving Leave Requests
Lesson 5: Approving Time Sheets
Lesson 6: Creating Shift Substitutions

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Lesson 1: MSS Overview

When you complete the MSS Overview lesson, you should be able to:

- Log on and navigate Manager Self Service (MSS), part of the BEACON system
- Navigate the **Universal Worklist**
- View the **Reminder of Dates** service

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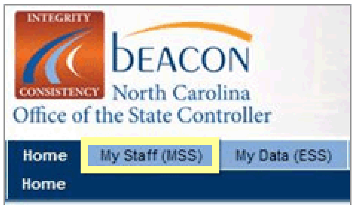
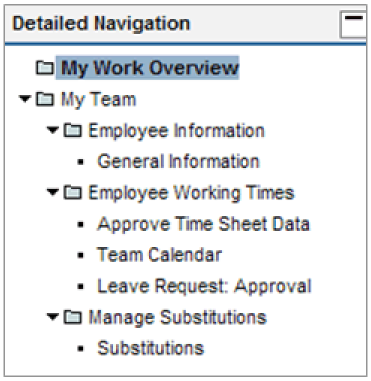
What is MSS?

Manager Self Service (MSS), or My Staff, is part of the BEACON system and provides a single access point for managers to find employee information and to perform managerial tasks.

MSS users must be designated as a Line Supervisor (B 002) in the organizational structure to access MSS My Staff functions.

NOTE: Your screen may look slightly different depending on your work responsibilities.


INTEGRITY
BEACON
CONSISTENCY
North Carolina
Office of the State Controller
Home
My Staff (MSS)
My Data (ESS)
Home


Detailed Navigation
My Work Overview
My Team
Employee Information
General Information
Employee Working Times
Approve Time Sheet Data
Team Calendar
Leave Request: Approval
Manage Substitutions
Substitutions

REVIEW
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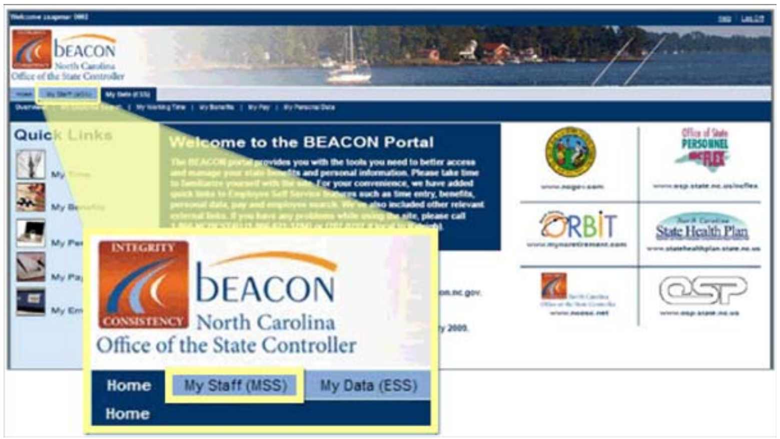
How do I get to MSS?

To log on to BEACON, go to:

https://mybeacon.nc.gov

Log in using your NCID and password.

Click **My Staff (MSS)**.


Quick Links
Welcome to the BEACON Portal
Home
My Staff (MSS)
My Data (ESS)
Home

REVIEW

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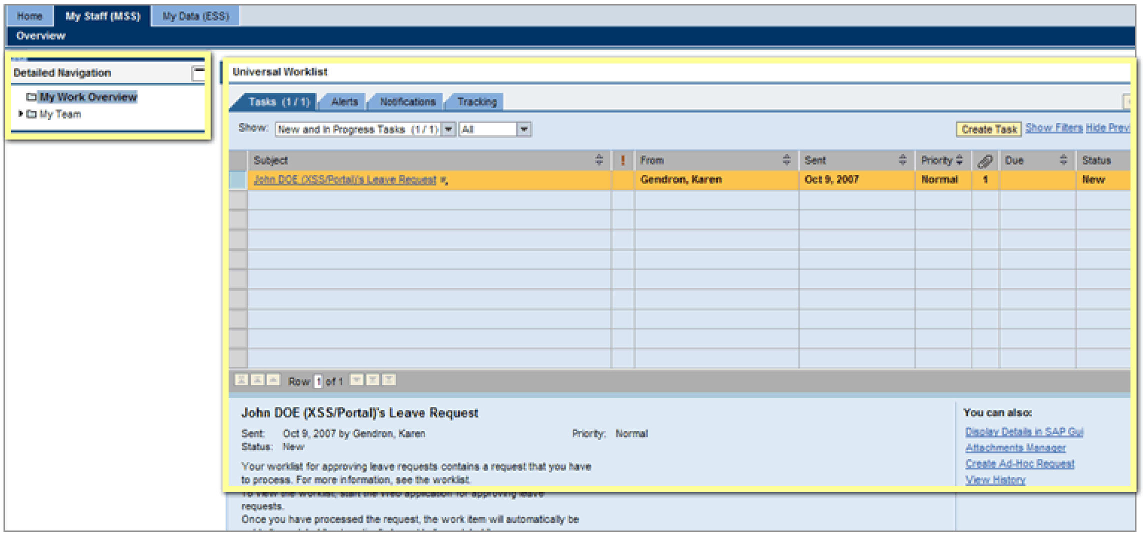
The Overview page displays the **Detailed Navigation** list on the left and **Universal Worklist** on the right.


Home
My Staff (MSS)
My Data (ESS)
Overview
Detailed Navigation
My Work Overview
My Team
Universal Worklist
Tasks (1 / 1)
Alerts
Notifications
Tracking
Create Task
Show Filters
Hide Prev
Row 1 of 1
You can also:
Display Details in SAP Gui
Attachments Manager
Create Ad-Hoc Request
View History

Show: New and In Progress Tasks (1 / 1) All

Subject	!	From	Sent	Priority	🖇	Due	Status
John DOE (XSS/Portal)'s Leave Request		Gendron, Karen	Oct 9, 2007	Normal	1		New

John DOE (XSS/Portal)'s Leave Request

Sent: Oct 9, 2007 by Gendron, Karen Priority: Normal
Status: New

Your worklist for approving leave requests contains a request that you have to process. For more information, see the worklist.
To view the worklist, start the Web application for approving leave requests.
Once you have processed the request, the work item will automatically be

REVIEW

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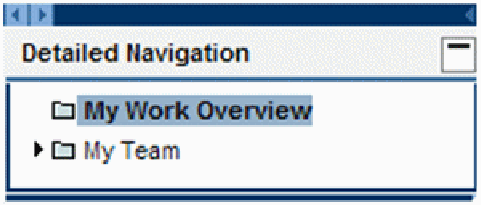
Detailed Navigation

As you see under **Detailed Navigation**, there are two main parts of MSS.

- **My Work Overview**, which includes the Universal Worklist
- **My Team**

To view detailed information within the **My Team** category, expand the folder to the next level by clicking the ▶ node next to the folder.


Detailed Navigation
My Work Overview
My Team

REVIEW
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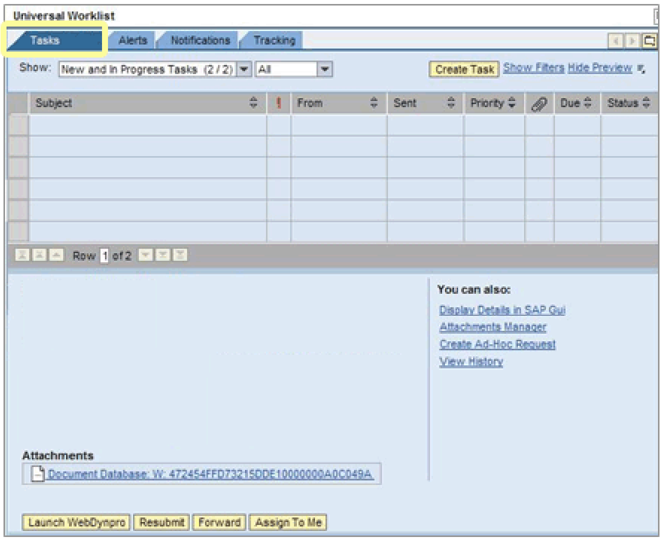
Universal Worklist Tabs

The Universal Worklist has four tabs that organize information - Tasks, Alerts, Notifications and Tracking.

Tasks -- If you are a manager who approves leave requests, requests awaiting your approval display on this page.

This topic is covered in Lesson 4 -- **Approving Leave Requests**.

NOTE: The Alerts, Notifications and Tracking tabs are for future use and are not activated at this time.


Universal Worklist
Tasks
Alerts
Notifications
Tracking
Create Task
Show Filters
Hide Preview
Subject
!
From
Sent
Priority
Due
Status
Row 1 of 2
You can also:
Display Details in SAP Gui
Attachments Manager
Create Ad-Hoc Request
View History
Launch WebDynpro
Resubmit
Forward
Assign To Me

Show: New and In Progress Tasks (2 / 2) All

Attachments

Document Database: W: 472454FFD73215DDE10000000A0C049A

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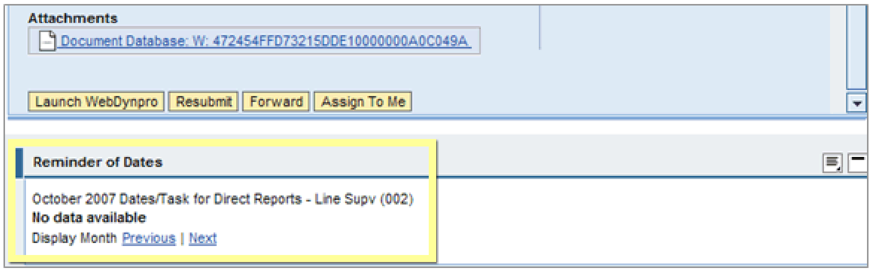
Reminder of Dates - This tool is found at the very bottom of the Universal Worklist.


Attachments
Document Database: W: 472454FFD73215DDE10000000A0C049A
Launch WebDynpro
Resubmit
Forward
Assign To Me
Reminder of Dates

October 2007 Dates/Task for Direct Reports - Line Supv (002)

No data available

Display Month Previous | Next

Reminder of Dates, found at the very bottom of the Universal Worklist, is a useful feature.

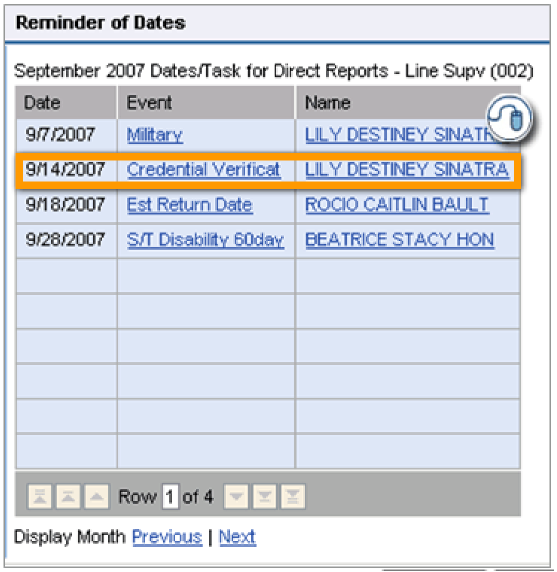
You can use it to monitor upcoming important dates and deadlines for your employees.

The reminder will alert you of such events as Training, Credential Checks, and Returns from LOA (Leaves of Absence). Your employees’ birthdays are also included.

The reminders originate from the employees’ master records. You do not add your own dates.

To view the details of a particular event, click the event.

Click the highlighted event to view its details.



Reminder of Dates

September 2007 Dates/Task for Direct Reports - Line Supv (002)

Date	Event	Name
9/7/2007	Military	LILY DESTINEY SINATR
9/14/2007	Credential Verificat	LILY DESTINEY SINATRA
9/18/2007	Est Return Date	ROCIO CAITLIN BAULT
9/28/2007	S/T Disability 60day	BEATRICE STACY HON

Row 1 of 4

Display Month Previous | Next

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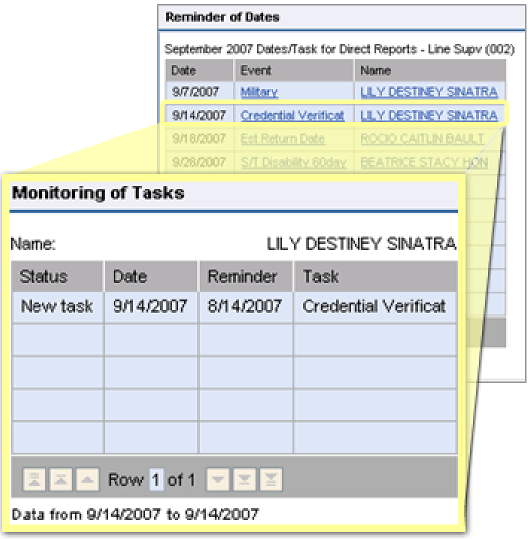
A Monitoring of Tasks page displays.



Reminder of Dates

September 2007 Dates/Task for Direct Reports - Line Supv (002)

Date	Event	Name
9/7/2007	Military	LILY DESTINEY SINATRA
9/14/2007	Credential Verificat	LILY DESTINEY SINATRA
9/18/2007	Est Return Date	ROCIO CAITLIN BAULT
9/28/2007	S/T Disability 60day	BEATRICE STACY HON

Monitoring of Tasks

Name: LILY DESTINEY SINATRA

Status	Date	Reminder	Task
New task	9/14/2007	8/14/2007	Credential Verificat

Row 1 of 1

Data from 9/14/2007 to 9/14/2007

REVIEW

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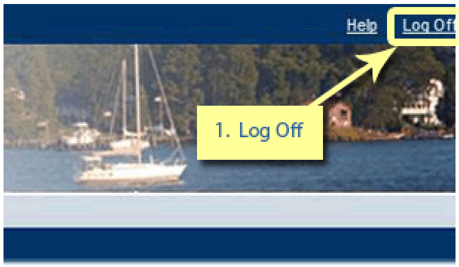
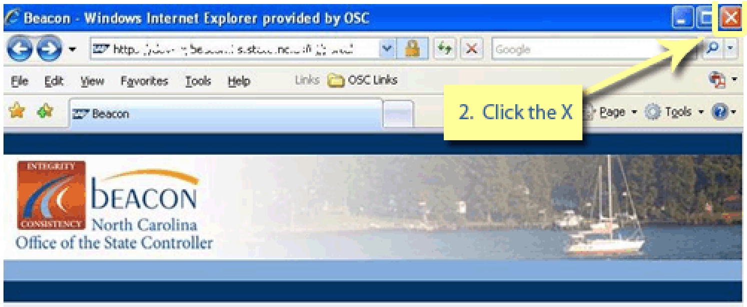
When you are finished using MSS, it is **very important** to exit the application by either:

- logging off

or

- clicking the **X** to close the browser window


Help
Log Off
1. Log Off


Beacon - Windows Internet Explorer provided by OSC
File Edit View Favorites Tools Help
Links OSC Links
Beacon
Page Tools
2. Click the X
BEACON
North Carolina
Office of the State Controller

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You have now completed Lesson 1, **MSS Overview**.
You should have learned how to:

- Log on and navigate Manager Self Service (MSS), part of the BEACON system
- Navigate the **Universal Worklist**
- View the **Reminder of Dates** service

Click Next to go to Lesson 2, My Team

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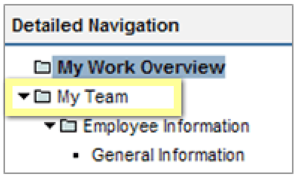
Lesson 2: My Team

This lesson shows you the various elements of working with the My Team function of MSS.

Upon completion of this lesson, you should be able to:

- Identify the elements of the Employee Information screen
- Understand the Team Calendar


Detailed Navigation
My Work Overview
My Team
Employee Information
General Information

REVIEW

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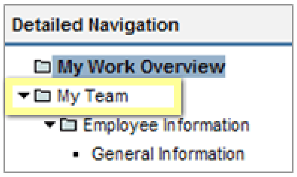
Expand the folders to navigate to the General Information page by clicking the triangle next to the My Team folder. This page enables you to find basic information about your employees.

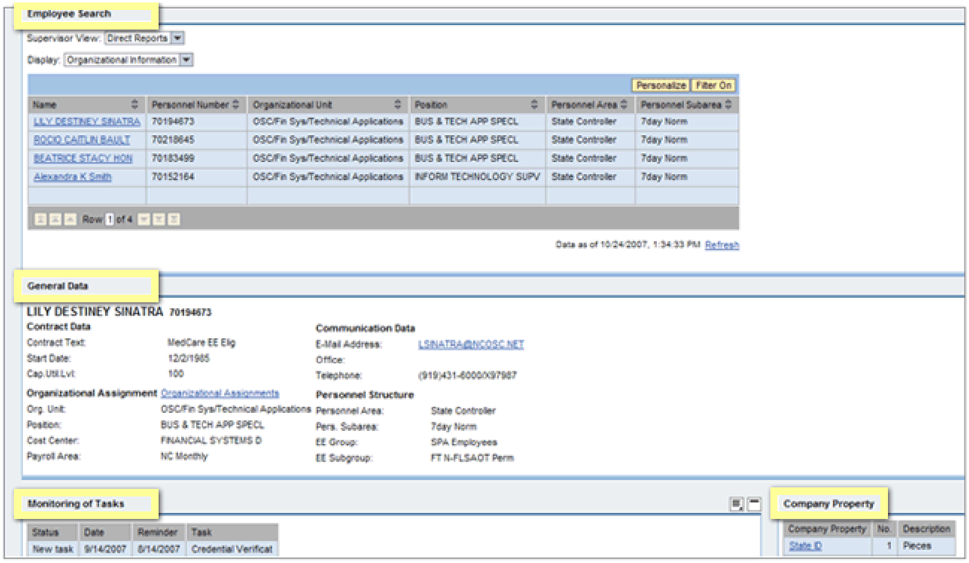

Detailed Navigation
My Work Overview
My Team
Employee Information
General Information

- Employee Search
- General Data
- Monitoring of Tasks
- Company Property

Employee Information

The main elements of the Employee Information Screen are:

- Employee Search
- General Data
- Monitoring of Tasks
- Company Property



Employee Search

Supervisor View: Direct Reports

Display: Organizational Information

Name	Personnel Number	Organizational Unit	Position	Personnel Area	Personnel Subarea
LILY DESTINEY SINATRA	70194673	OSC/Fin Sys/Technical Applications	BUS & TECH APP SPECL	State Controller	7day Norm
ROCIO CAITLIN BAULT	70218645	OSC/Fin Sys/Technical Applications	BUS & TECH APP SPECL	State Controller	7day Norm
BEATRICE STACY HON	70183499	OSC/Fin Sys/Technical Applications	BUS & TECH APP SPECL	State Controller	7day Norm
Alexandra K Smith	70152164	OSC/Fin Sys/Technical Applications	INFORM TECHNOLOGY SUPV	State Controller	7day Norm

Data as of 10/24/2007, 1:34:33 PM

General Data

LILY DESTINEY SINATRA 70194673

Contract Data

Contract Text: MedCare EE Elig
Start Date: 12/2/1985
Cap.Util.Lvl: 100

Organizational Assignment Organizational Assignments

Org. Unit: OSC/Fin Sys/Technical Applications
Position: BUS & TECH APP SPECL
Cost Center: FINANCIAL SYSTEMS D
Payroll Area: NC Monthly

Communication Data

E-Mail Address: LSINATRA@NCOSC.NET
Office:
Telephone: (919)431-6000X97987

Personnel Structure

Personnel Area: State Controller
Pers. Subarea: 7day Norm
EE Group: SPA Employees
EE Subgroup: FT N-FLSAOT Perm

Monitoring of Tasks

Status	Date	Reminder	Task
New task	9/14/2007	8/14/2007	Credential Verificat

Company Property

Company Property	No.	Description
State ID	1	Pieces

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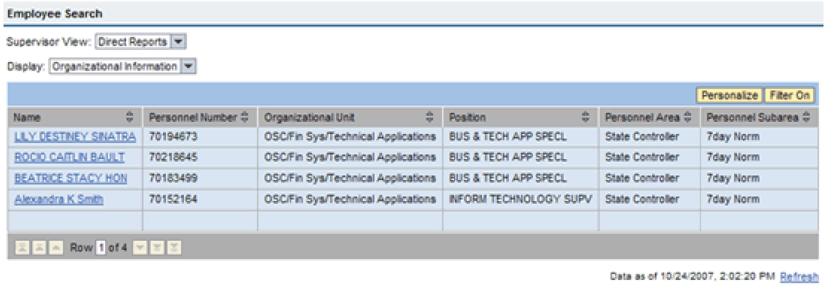
Employee Search

This section displays a list of your direct reporting employees. When you click an employee's name, the lower part of the screen displays the employee's data.



Employee Search

Supervisor View: Direct Reports

Display: Organizational Information

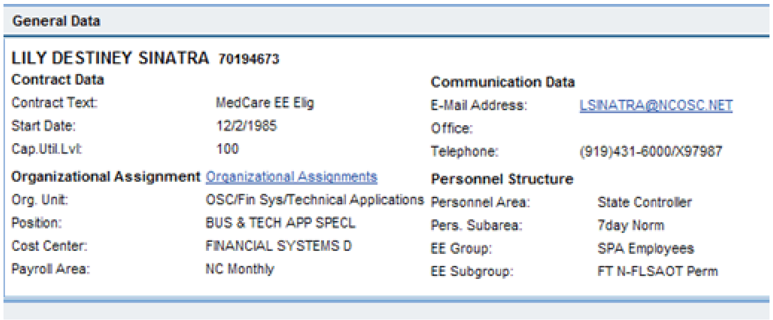
Name	Personnel Number	Organizational Unit	Position	Personnel Area	Personnel Subarea
LILY DESTINEY SINATRA	70194673	OSC/Fin Sys/Technical Applications	BUS & TECH APP SPECL	State Controller	7day Norm
ROCIO CAITLIN BAULT	70218645	OSC/Fin Sys/Technical Applications	BUS & TECH APP SPECL	State Controller	7day Norm
BEATRICE STACY HON	70183499	OSC/Fin Sys/Technical Applications	BUS & TECH APP SPECL	State Controller	7day Norm
Alexandra K Smith	70152164	OSC/Fin Sys/Technical Applications	INFORM TECHNOLOGY SUPV	State Controller	7day Norm

Row 1 of 4

Data as of 10/24/2007, 2:02:20 PM Refresh

General Data

This section provides you with an overview of the selected employee's master data, organizational data and contact information.



General Data

LILY DESTINEY SINATRA 70194673

Contract Data
Contract Text: MedCare EE Elig
Start Date: 12/2/1985
Cap.Util.Lvl: 100

Communication Data
E-Mail Address: LSINATRA@NCOSC.NET
Office:
Telephone: (919)431-6000/X97987

Organizational Assignment Organizational Assignments
Org. Unit: OSC/Fin Sys/Technical Applications
Position: BUS & TECH APP SPECL
Cost Center: FINANCIAL SYSTEMS D
Payroll Area: NC Monthly

Personnel Structure
Personnel Area: State Controller
Pers. Subarea: 7day Norm
EE Group: SPA Employees
EE Subgroup: FT N-FLSAOT Perm

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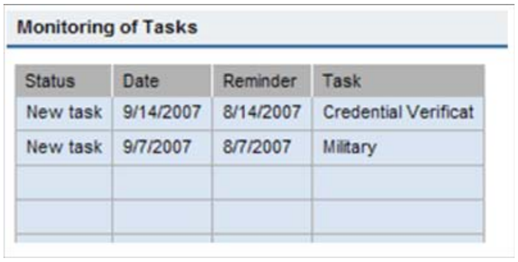
Monitoring of Tasks

This section displays dates, reminders and tasks for the selected employee, such as return from short-term disability or credential verification.



Monitoring of Tasks

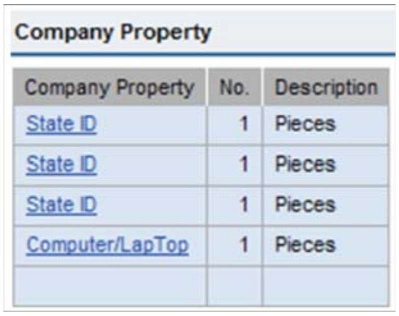
Status	Date	Reminder	Task
New task	9/14/2007	8/14/2007	Credential Verificat
New task	9/7/2007	8/7/2007	Military

REVIEW <<BACK NEXT>>

Company Property

This section displays the State objects, such as a computer, ID badge and keys, on loan for the selected employee.

NOTE: Updates to Company Property must be performed by your local HR Administrator.



Company Property

Company Property	No.	Description
State ID	1	Pieces
State ID	1	Pieces
State ID	1	Pieces
Computer/LapTop	1	Pieces

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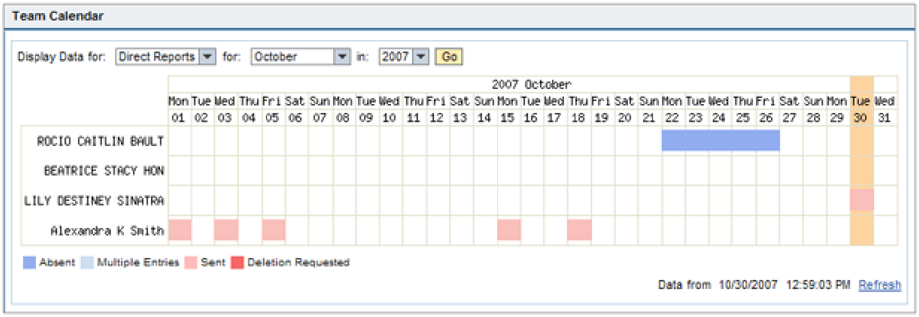
Another useful tool in **My Team** is the **Team Calendar**.

The **Team Calendar** displays scheduled absences and pending leave requests for your employees for the current month. You can display other months as well.



Team Calendar

Display Data for: Direct Reports for: October in: 2007 Go

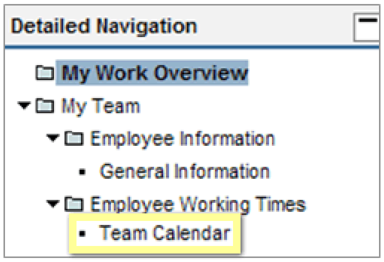
2007 October

	Mon 01	Tue 02	Wed 03	Thu 04	Fri 05	Sat 06	Sun 07	Mon 08	Tue 09	Wed 10	Thu 11	Fri 12	Sat 13	Sun 14	Mon 15	Tue 16	Wed 17	Thu 18	Fri 19	Sat 20	Sun 21	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Sun 28	Mon 29	Tue 30	Wed 31
ROCIO CAITLIN BAULT																						🟦	🟦	🟦	🟦	🟦					
BEATRICE STACY HON																															
LILY DESTINEY SINATRA																														▨	
Alexandra K Smith	▨		▨		▨										▨			▨													

🟦 Absent ▢ Multiple Entries ▨ Sent 🟥 Deletion Requested

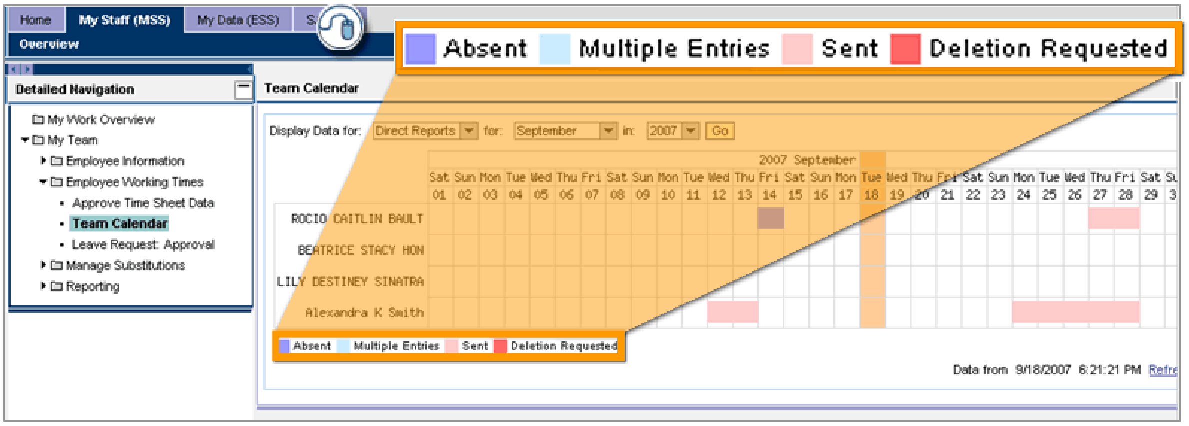
Data from 10/30/2007 12:59:03 PM Refresh

To find the **Team Calendar**, go to **My Team**, **Employee Working Times**, and then **Team Calendar**.


Detailed Navigation
My Work Overview
My Team
Employee Information
General Information
Employee Working Times
Team Calendar

Weekly
Weekly

The **Team Calendar** uses a color code to represent absences.


Home
My Staff (MSS)
My Data (ESS)
Overview
Detailed Navigation
My Work Overview
My Team
Employee Information
Employee Working Times
Approve Time Sheet Data
Team Calendar
Leave Request: Approval
Manage Substitutions
Reporting
Team Calendar
Display Data for: Direct Reports for: September in: 2007 Go
2007 September
ROCIO CAITLIN BAULT
BEATRICE STACY HON
LILY DESTINEY SINATRA
Alexandra K Smith
Absent
Multiple Entries
Sent
Deletion Requested
Data from 9/18/2007 6:21:21 PM

Absent - Indicates a scheduled absence or approved leave request.

Click **the colored blocks to learn more about each code.**

True or False

You can enter your own dates in the Reminder of Dates service to help you remember employment events.

☐ True
☐ False

Submit Reset

Using your mouse, select the correct answer, then click the Submit button.

REVIEW

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You have now completed Lesson 2, **My Team**. You should have learned how to:

- View employee information
- View the team calendar

Click Next to go to Lesson 3, Finding Help

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NEXT>>

Lesson 3: Finding Help

This lesson shows you how to find help with MSS.

Upon completion of this lesson, you should be able to:

- Find the resources available when you have questions about MSS

REVIEW

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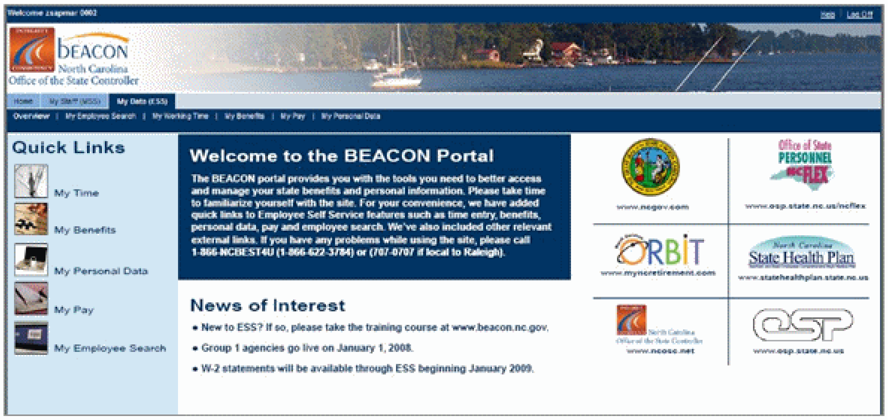
NEXT>>

Finding Help

Lesson 3

There are a variety of resources to help you to use Manager Self Service (MSS) in the BEACON portal.


Help | Log Off
Home
My Staff (MSS)
My Data (ESS)
Overview | My Employee Search | My Working Time | My Benefits | My Pay | My Personal Data
Quick Links
My Time
My Benefits
My Personal Data
My Pay
My Employee Search
www.ncgov.com
Office of State Personnel NCFLEX
www.osp.state.nc.us/ncflex
ORBIT
www.myncretirement.com
North Carolina State Health Plan
www.statehealthplan.state.nc.us
North Carolina Office of the State Controller
www.ncosc.net
OSP
www.osp.state.nc.us

Welcome to the BEACON Portal

The BEACON portal provides you with the tools you need to better access and manage your state benefits and personal information. Please take time to familiarize yourself with the site. For your convenience, we have added quick links to Employee Self Service features such as time entry, benefits, personal data, pay and employee search. We've also included other relevant external links. If you have any problems while using the site, please call 1-866-NCBEST4U (1-866-622-3784) or (707-0707 if local to Raleigh).

News of Interest

- New to ESS? If so, please take the training course at www.beacon.nc.gov.
- Group 1 agencies go live on January 1, 2008.
- W-2 statements will be available through ESS beginning January 2009.

REVIEW

<<BACK NEXT>>

Finding Help

If you need help using Manager Self Service (MSS) in BEACON, feel free to use these resources:

For general ESS/MSS questions and questions about **benefits and pay**, contact your local agency HR benefits representative.

For questions about the **how to use MSS**, contact **BEST** * Shared Services:

- Phone, Raleigh Area: 919-707-0707
- Phone, Statewide: 866-NCBEST4U (866-622-3784)
- E-mail: best@ncosc.net

***BEST stands for BEACON Enterprise Support Team**

Also:

- BEACON University http://www.beacon.nc.gov (Click “Training.”) **Job Aids**: http://help.mybeacon.nc.gov/beaconhelp
- **Manager Self Service (MSS) Guide** includes Time Entry section. This is a PDF document that allows you to print the complete guide: http://www.beacon.nc.gov/training/library/MS200JobAid.pdf
- **Leave Administration Quick Reference Guide:** http://help.mybeacon.nc.gov/beaconhelp/Human_Resources/Time/Job_%20Aids/pdf_Leave_Admin_Guide%20QRC_082108.pdf

TIP: Print this page so you have the information readily available.

REVIEW

<<BACK NEXT>>

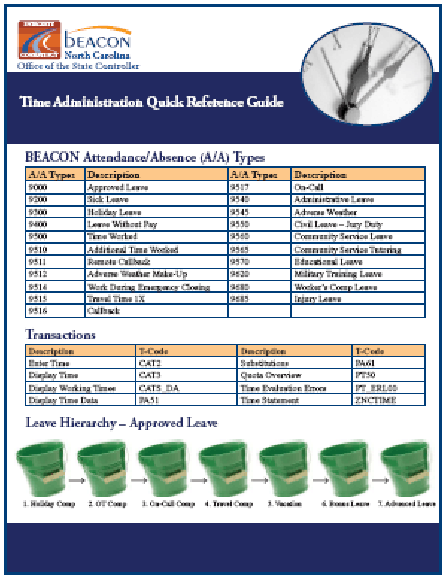
Finding Help

For managers who approve hours and leave time for employees, there is a Time Administration Quick Reference Guide that can be printed.

It includes:

- Attendance/Absence Types
- Minutes/Decimals Conversion for Time Entry
- Transaction Codes
- Leave Hierarchy

If you have time entry questions ask your **Time Administrator.**



BEACON North Carolina Office of the State Controller

Time Administration Quick Reference Guide

BEACON Attendance/Absence (A/A) Types

A/A Types	Description	A/A Types	Description
9000	Approved Leave	9517	On-Call
9200	Sick Leave	9540	Administrative Leave
9300	Holiday Leave	9545	Adverse Weather
9400	Leave Without Pay	9550	Civil Leave – Jury Duty
9500	Time Worked	9560	Community Service Leave
9510	Additional Time Worked	9565	Community Service Tutoring
9511	Remote Callback	9570	Educational Leave
9512	Adverse Weather Make-Up	9620	Military Training Leave
9514	Work During Emergency Closing	9680	Worker's Comp Leave
9515	Travel Time 1X	9685	Injury Leave
9516	Callback		

Transactions

Description	T-Code	Description	T-Code
Enter Time	CAT2	Substitutions	PA61
Display Time	CAT3	Quota Overview	PT50
Display Working Times	CATS_DA	Time Evaluation Errors	PT_ERL00
Display Time Data	PA51	Time Statement	ZNCTIME

Leave Hierarchy – Approved Leave

1. Holiday Comp → 2. OT Comp → 3. On-Call Comp → 4. Travel Comp → 5. Vacation → 6. Bonus Leave → 7. Advanced Leave

Click to view the full Time Administration Quick Reference Guide

REVIEW

<<BACK NEXT>>

You have completed the **Finding Help** lesson.

You should now be able to:

- Find the resources to help you when you have questions about MSS

Click Next

REVIEW

<<BACK NEXT>>

There are **three** remaining lessons.

If you are a manager who approves employee leave and time sheets, click **Lesson 4** to continue and then complete **Lesson 5**.

If you do not need to complete lessons 4 or 5 but supervise shift employees, click **Lesson 6** to continue.

Lesson 4: Approving Leave Requests
Lesson 5: Approving Time Sheets
Lesson 6: Creating Shift Substitutions

If you do not approve employee leave requests and time sheets or supervise shift employees, click the **Complete the Course** button below.

Complete the Course

Lesson 4: Approving Leave Requests

Upon completion of the **Approving Leave Requests** lesson, you should be able to:

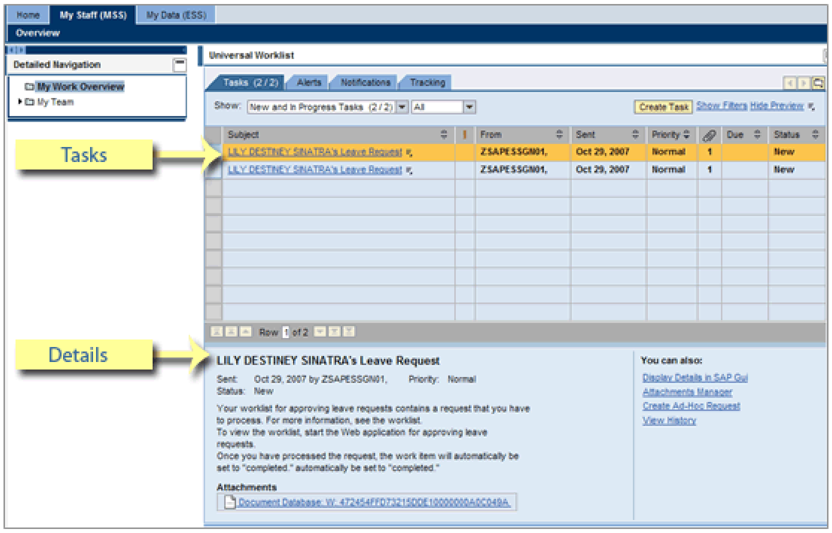
- Approve leave requests from your employees using MSS

REVIEW
<<BACK
NEXT>>

When you click **My Work Overview** in MSS, the **Universal Worklist** displays.

As your employees request a leave of absence using Employee Self Service (ESS), their requests display in the **Tasks** section of your Universal Worklist.

When you select a task, the details display at the bottom of the page.


Home
My Staff (MSS)
My Data (ESS)
Overview
Detailed Navigation
My Work Overview
My Team
Universal Worklist
Tasks (2 / 2)
Alerts
Notifications
Tracking
Show: New and In Progress Tasks (2 / 2)
All
Create Task
Show Filters
Hide Preview
Tasks
Details
Row 1 of 2

Subject	!	From	Sent	Priority	📎	Due	Status
LILY DESTINEY SINATRA's Leave Request		ZSAPESSGM01,	Oct 29, 2007	Normal	1		New
LILY DESTINEY SINATRA's Leave Request		ZSAPESSGM01,	Oct 29, 2007	Normal	1		New

LILY DESTINEY SINATRA's Leave Request

Sent: Oct 29, 2007 by ZSAPESSGM01, Priority: Normal
Status: New

Your worklist for approving leave requests contains a request that you have to process. For more information, see the worklist.
To view the worklist, start the Web application for approving leave requests.
Once you have processed the request, the work item will automatically be set to "completed." automatically be set to "completed."

Attachments

Document Database: W: 472454FFD73215DDE10000000A0C049A.

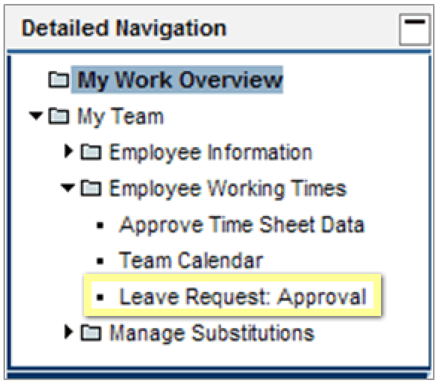
You can also:

Display Details in SAP Gui
Attachments Manager
Create Ad-Hoc Request
View History

REVIEW
<<BACK
NEXT>>

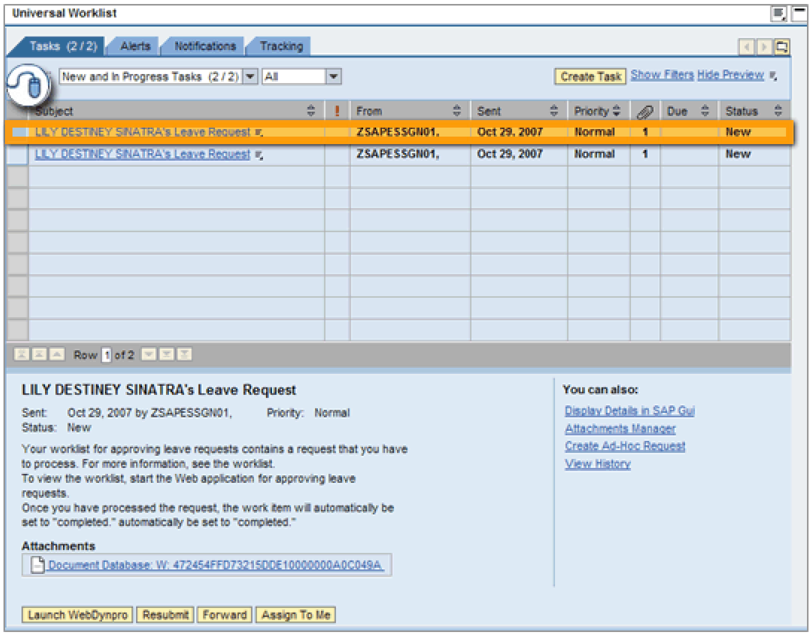
Another way to access pending leave requests is from the **Detailed Navigation** pane.

In the next exercise, you will complete the steps to approve a leave request.


Detailed Navigation
My Work Overview
My Team
Employee Information
Employee Working Times
Approve Time Sheet Data
Team Calendar
Leave Request: Approval
Manage Substitutions

In the **Universal Worklist**, you see that your employee, Lily, has submitted two leave requests.

Select the first request.


Universal Worklist
Tasks (2 / 2)
Alerts
Notifications
Tracking
New and In Progress Tasks (2 / 2)
All
Create Task
Show Filters
Hide Preview
Row 1 of 2
Launch WebDynpro
Resubmit
Forward
Assign To Me

Subject	!	From	Sent	Priority	📎	Due	Status
LILY DESTINEY SINATRA's Leave Request		ZSAPESSGN01,	Oct 29, 2007	Normal	1		New
LILY DESTINEY SINATRA's Leave Request		ZSAPESSGN01,	Oct 29, 2007	Normal	1		New

LILY DESTINEY SINATRA's Leave Request

Sent: Oct 29, 2007 by ZSAPESSGN01, Priority: Normal
Status: New

Your worklist for approving leave requests contains a request that you have to process. For more information, see the worklist.
To view the worklist, start the Web application for approving leave requests.
Once you have processed the request, the work item will automatically be set to "completed." automatically be set to "completed."

Attachments

Document Database: W: 472454FFD73215DDE10000000A0C049A

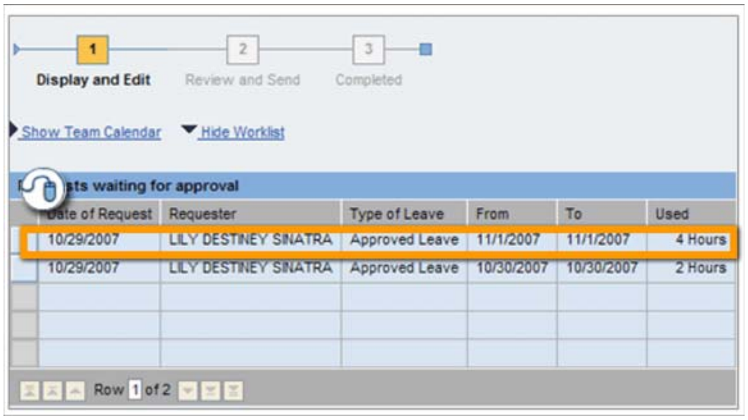
You can also:

- Display Details in SAP Gui
- Attachments Manager
- Create Ad-Hoc Request
- View History

The **Display and Edit** page displays, listing both leave requests.

Notice that there are no action buttons at the bottom. The buttons display after you identify which leave request you want to process.

Click the first request now.


1 Display and Edit
2 Review and Send
3 Completed
Show Team Calendar
Hide Worklist

sts waiting for approval

ate of Request	Requester	Type of Leave	From	To	Used
10/29/2007	LILY DESTINEY SINATRA	Approved Leave	11/1/2007	11/1/2007	4 Hours
10/29/2007	LILY DESTINEY SINATRA	Approved Leave	10/30/2007	10/30/2007	2 Hours

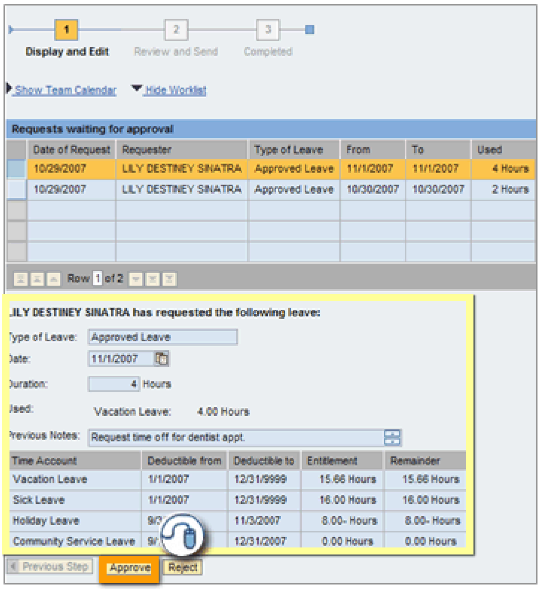
Row 1 of 2

Approving Leave Requests

Lesson 4

Details of the leave request display on the bottom of the same page for your review.

Click the Approve button now.



1 Display and Edit
2 Review and Send
3 Completed
Show Team Calendar
Hide Worklist

Requests waiting for approval

Date of Request	Requester	Type of Leave	From	To	Used
10/29/2007	LILY DESTINEY SINATRA	Approved Leave	11/1/2007	11/1/2007	4 Hours
10/29/2007	LILY DESTINEY SINATRA	Approved Leave	10/30/2007	10/30/2007	2 Hours

Row 1 of 2

ILY DESTINEY SINATRA has requested the following leave:

ype of Leave: Approved Leave
ate: 11/1/2007
uration: 4 Hours
sed: Vacation Leave: 4.00 Hours
revious Notes: Request time off for dentist appt.

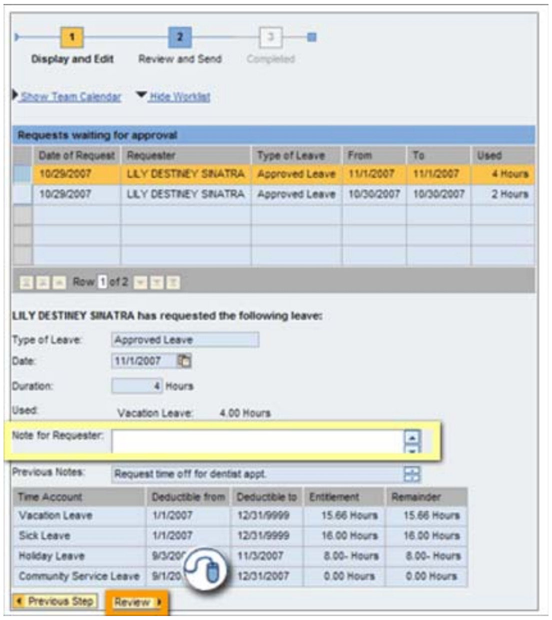
Time Account	Deductible from	Deductible to	Entitlement	Remainder
Vacation Leave	1/1/2007	12/31/9999	15.66 Hours	15.66 Hours
Sick Leave	1/1/2007	12/31/9999	16.00 Hours	16.00 Hours
Holiday Leave	9/3	11/3/2007	8.00- Hours	8.00- Hours
Community Service Leave	9/	12/31/2007	0.00 Hours	0.00 Hours

Previous Step
Approve
Reject

The **Review and Send** page displays.

On this page, you can enter any notes that you may want to send to your employee concerning the leave.

Click the Review button now.



Requests waiting for approval

Date of Request	Requester	Type of Leave	From	To	Used
10/29/2007	LILY DESTINEY SINATRA	Approved Leave	11/1/2007	11/1/2007	4 Hours
10/29/2007	LILY DESTINEY SINATRA	Approved Leave	10/30/2007	10/30/2007	2 Hours

Row 1 of 2

LILY DESTINEY SINATRA has requested the following leave:

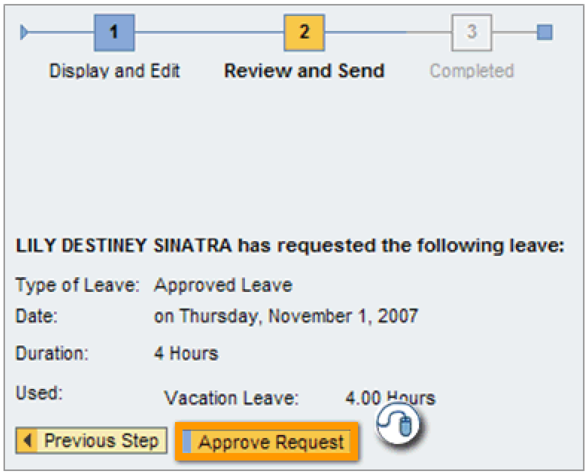
Type of Leave: Approved Leave
Date: 11/1/2007
Duration: 4 Hours
Used: Vacation Leave: 4.00 Hours
Note for Requester:
Previous Notes: Request time off for dentist appt.

Time Account	Deductible from	Deductible to	Entitlement	Remainder
Vacation Leave	1/1/2007	12/31/9999	15.66 Hours	15.66 Hours
Sick Leave	1/1/2007	12/31/9999	16.00 Hours	16.00 Hours
Holiday Leave	9/3/20	11/3/2007	8.00- Hours	8.00- Hours
Community Service Leave	9/1/20	12/31/2007	0.00 Hours	0.00 Hours

REVIEW
<<BACK
NEXT>>

The page at the right displays.

Click the Approve Request button now.


1
Display and Edit
2
Review and Send
3
Completed
Previous Step
Approve Request

LILY DESTINEY SINATRA has requested the following leave:

Type of Leave: Approved Leave
Date: on Thursday, November 1, 2007
Duration: 4 Hours
Used: Vacation Leave: 4.00 Hours

REVIEW
<<BACK
NEXT>>

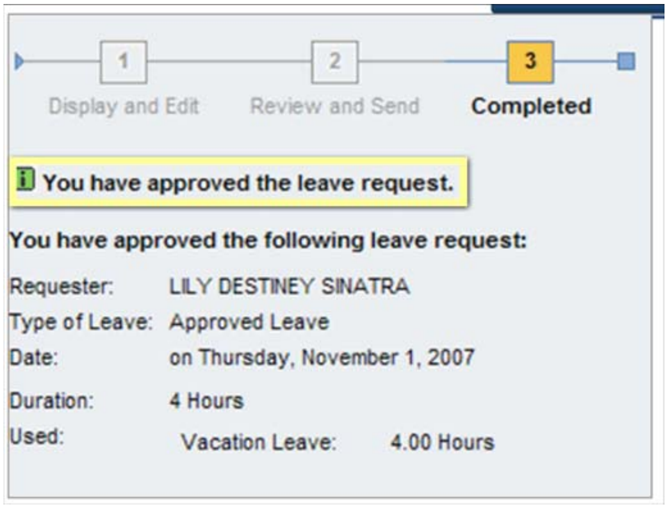
The **Completed** page displays with a confirmation message that you have approved the request.

Lily will receive notification in ESS that you approved the leave request.

To approve Lily's second request, you would close the window and return to the Universal Worklist to repeat the process.

NOTES:
To reject a leave request, you would follow the same process but select the reject buttons.

If an employee fails to complete a leave request, you may approve the submitted leave on the time sheet without prior approval through BEACON. For example, your employee may have told you or e-mailed you about a doctor's appointment but failed to complete a leave request through BEACON. Your approval of the leave in the time sheet approval process is the critical step that affects the time records rather than the leave request and approval function in BEACON.



You have approved the leave request.

You have approved the following leave request:

Requester: LILY DESTINEY SINATRA
Type of Leave: Approved Leave
Date: on Thursday, November 1, 2007
Duration: 4 Hours
Used: Vacation Leave: 4.00 Hours

BEACON
North Carolina
Office of the State Controller

Home | Menu | Exit Manager Self-Service

Knowledge Check Lesson 2

True or False

After you approve a leave request, you need to inform your employee, by phone or in person, that it was approved.

☐ True

☐ False

Submit Reset

Using your mouse, select the correct answer, then click the Submit button.

REVIEW <<BACK NEXT>>

You have completed the **Approving Leave Requests** lesson.

You should now be able to:

- Approve employee leave requests using MSS

Click Next to go to Lesson 5, Approving Time Sheets

REVIEW

<<BACK NEXT>>

Lesson 5: Approving Time Sheets

Upon completion of the **Approving Time Sheets** lesson, you should be able to:

- Approve your employees' time sheets using MSS
- Access Time related reports to monitor and manage employee time approvals, errors, pending, and missing time sheets.

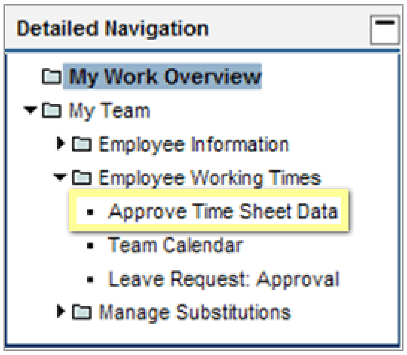
REVIEW

<<BACK NEXT>>

When your employees enter their time in ESS, the time sheet data is held, pending your approval. To approve the time sheets, go to **Detailed Navigation** and select **Approve Time Sheet Data**.

NOTE: Unlike leave requests, time sheets do not display in your Universal Worklist.

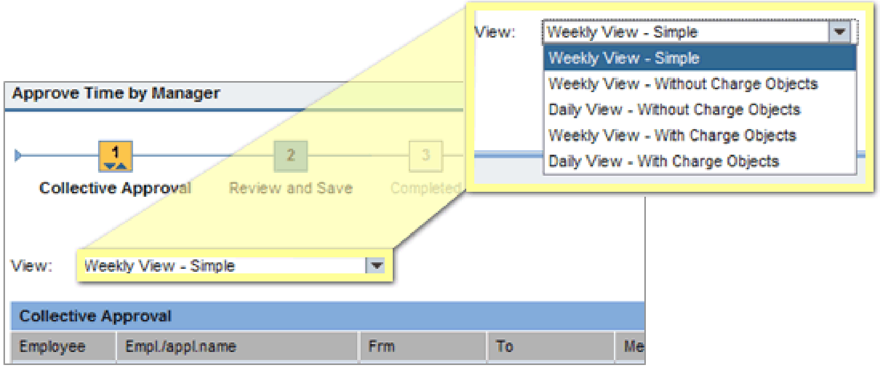
There is a Time Approver Entry Quick Reference Guide that you can print. It includes information on the time approval process, transaction codes, Attendance/Absence Types and Minutes/Decimals Conversion for Time Entry.


Detailed Navigation
My Work Overview
My Team
Employee Information
Employee Working Times
Approve Time Sheet Data
Team Calendar
Leave Request: Approval
Manage Substitutions

REVIEW
<<BACK
NEXT>>

You can choose to view your employees' hours a variety of ways, including weekly, daily, and with or without charge objects as illustrated here.

As you may remember from the introductory information in this course, Charge Objects refer to project or funding identifiers that are used by some work units to track hours. If your employees use charge objects, select those views if appropriate, but we will use the more common Without Charge Objects examples in this lesson.


Approve Time by Manager
1
Collective Approval
2
Review and Save
3
Completed
View:
Weekly View - Simple
Weekly View - Simple
Weekly View - Without Charge Objects
Daily View - Without Charge Objects
Weekly View - With Charge Objects
Daily View - With Charge Objects
Collective Approval
Employee
Empl./appl.name
Frm
To
Me

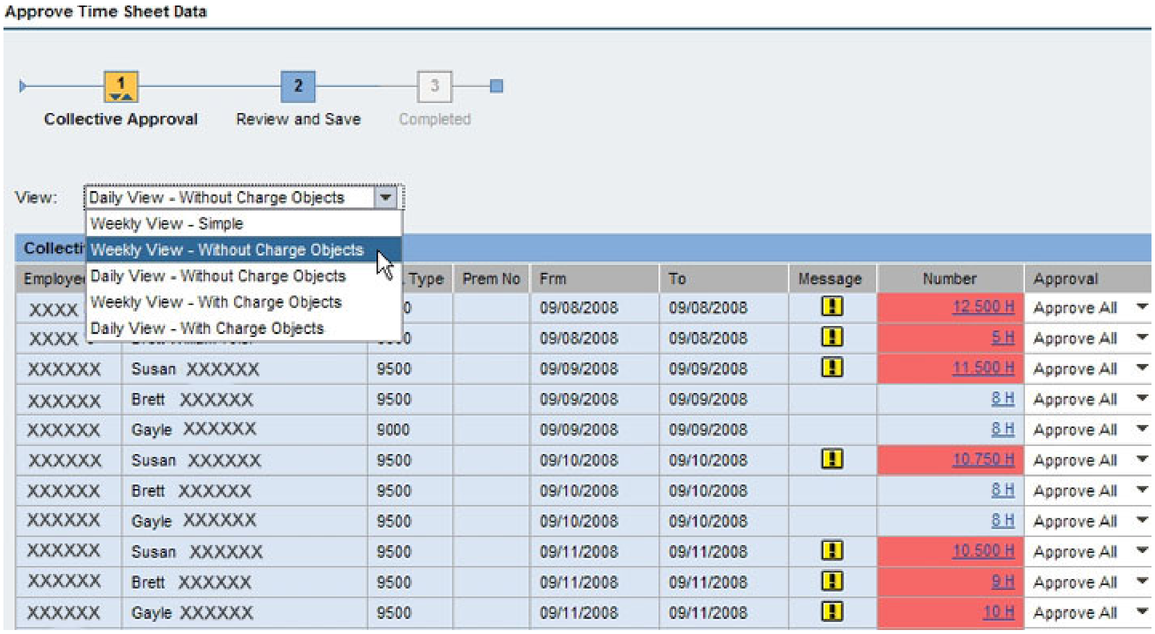
View: Weekly View - Simple

Approving Time Sheets

If your screen defaults to the **Daily View** as shown here, you will probably find it much easier to change the view to **Weekly** to get started.

Even with only three employees and four days displayed, it is difficult to see the overall workweek totals for the employees. Later, if you want to view an employee's daily hours, you will have that option.

To change to another view, click the arrow next to your current view and select your view, such as **Weekly - Without Charge Objects**, as shown here.


Approve Time Sheet Data

1 Collective Approval
2 Review and Save
3 Completed

View: Daily View - Without Charge Objects

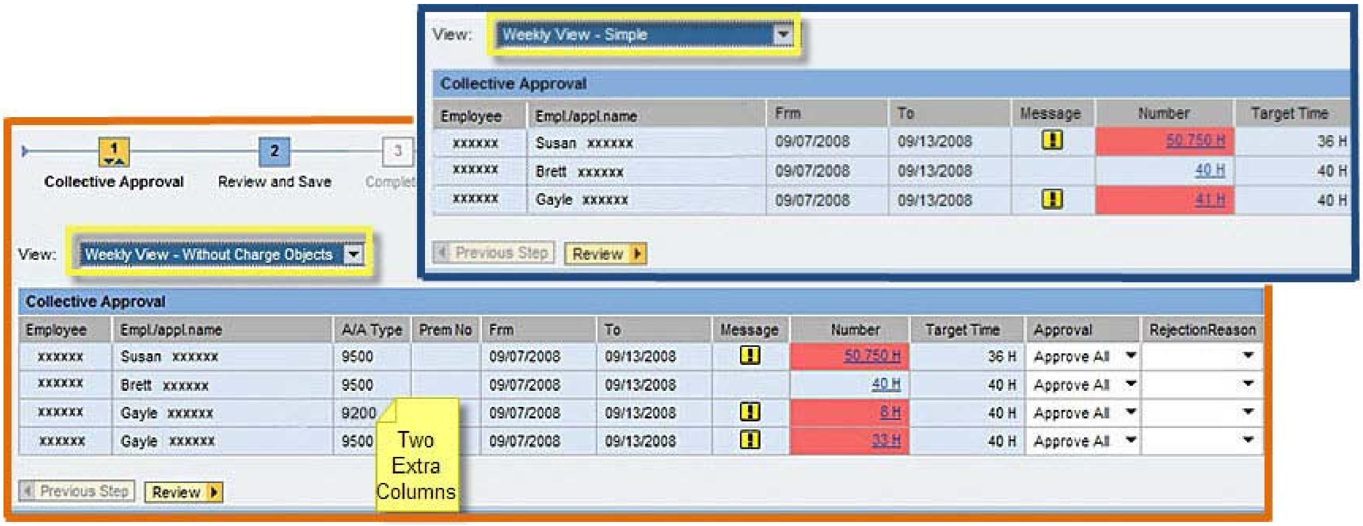
Weekly View - Simple
Weekly View - Without Charge Objects
Daily View - Without Charge Objects
Weekly View - With Charge Objects
Daily View - With Charge Objects

Collecti

Employe		. Type	Prem No	Frm	To	Message	Number	Approval
XXXX		0		09/08/2008	09/08/2008	!	12.500 H	Approve All
XXXX		0		09/08/2008	09/08/2008	!	5 H	Approve All
XXXXXX	Susan XXXXXX	9500		09/09/2008	09/09/2008	!	11.500 H	Approve All
XXXXXX	Brett XXXXXX	9500		09/09/2008	09/09/2008		8 H	Approve All
XXXXXX	Gayle XXXXXX	9000		09/09/2008	09/09/2008		8 H	Approve All
XXXXXX	Susan XXXXXX	9500		09/10/2008	09/10/2008	!	10.750 H	Approve All
XXXXXX	Brett XXXXXX	9500		09/10/2008	09/10/2008		8 H	Approve All
XXXXXX	Gayle XXXXXX	9500		09/10/2008	09/10/2008		8 H	Approve All
XXXXXX	Susan XXXXXX	9500		09/11/2008	09/11/2008	!	10.500 H	Approve All
XXXXXX	Brett XXXXXX	9500		09/11/2008	09/11/2008	!	9 H	Approve All
XXXXXX	Gayle XXXXXX	9500		09/11/2008	09/11/2008	!	10 H	Approve All

REVIEW
<<BACK
NEXT>>

Let's compare your other choice, **Weekly View - Simple**, to **Weekly View - Without Charge Objects**:



View: Weekly View - Simple

Collective Approval

Employee	Empl./appl.name	Frm	To	Message	Number	Target Time
xxxxxx	Susan xxxxxx	09/07/2008	09/13/2008	!	50.750 H	36 H
xxxxxx	Brett xxxxxx	09/07/2008	09/13/2008		40 H	40 H
xxxxxx	Gayle xxxxxx	09/07/2008	09/13/2008	!	41 H	40 H

View: Weekly View - Without Charge Objects

Collective Approval

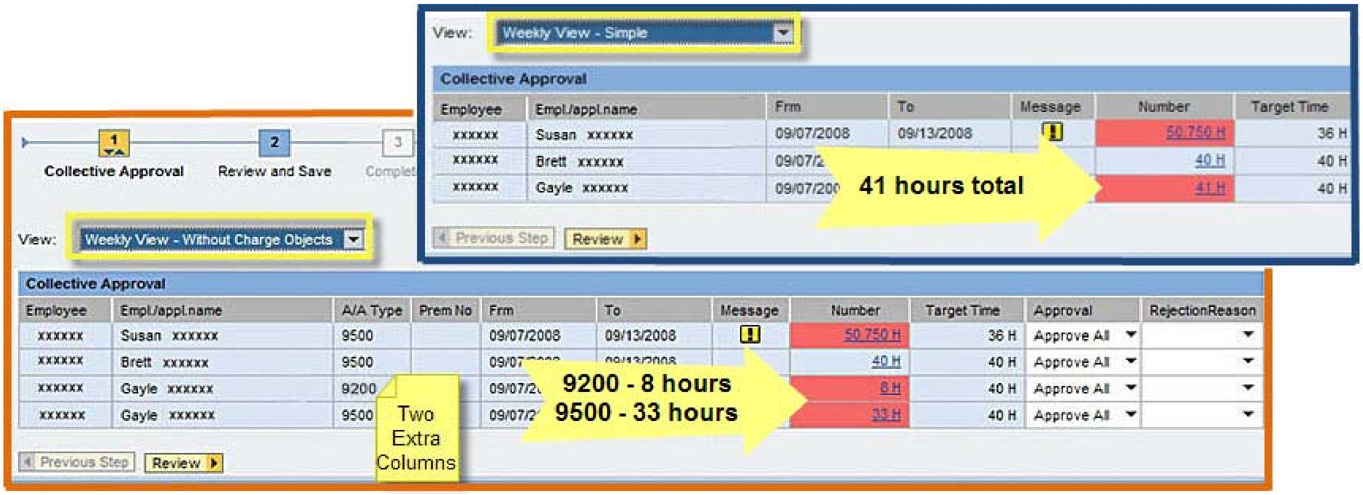
Employee	Empl./appl.name	A/A Type	Prem No	Frm	To	Message	Number	Target Time	Approval	RejectionReason
xxxxxx	Susan xxxxxx	9500		09/07/2008	09/13/2008	!	50.750 H	36 H	Approve All	
xxxxxx	Brett xxxxxx	9500		09/07/2008	09/13/2008		40 H	40 H	Approve All	
xxxxxx	Gayle xxxxxx	9200		09/07/2008	09/13/2008	!	8 H	40 H	Approve All	
xxxxxx	Gayle xxxxxx	9500		09/07/2008	09/13/2008	!	33 H	40 H	Approve All	

Two Extra Columns

As you can see, the **Weekly View - Without Charge Objects** has two extra columns, displaying each employee's weekly total hours by A/A Types rather than just total hours. We'll look at how Gayle's hours are displayed in each view next to focus on this difference.

REVIEW

<<BACK NEXT>>


Weekly View - Simple
1 Collective Approval
2 Review and Save
3 Complet
Weekly View - Without Charge Objects
41 hours total
Two Extra Columns
9200 - 8 hours
9500 - 33 hours
Previous Step
Review

View: Weekly View - Simple

Collective Approval

Employee	Empl./appl.name	Frm	To	Message	Number	Target Time
xxxxxx	Susan xxxxxx	09/07/2008	09/13/2008	!	50.750 H	36 H
xxxxxx	Brett xxxxxx	09/07/2			40 H	40 H
xxxxxx	Gayle xxxxxx	09/07/200			41 H	40 H

View: Weekly View - Without Charge Objects

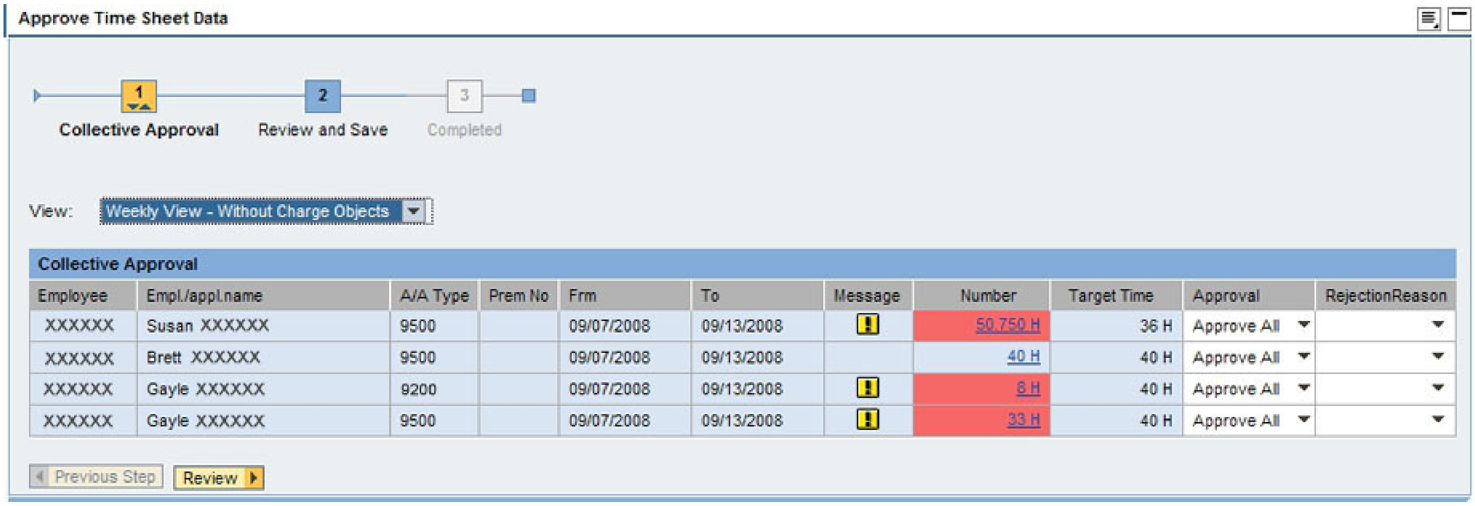
Collective Approval

Employee	Empl./appl.name	A/A Type	Prem No	Frm	To	Message	Number	Target Time	Approval	RejectionReason
xxxxxx	Susan xxxxxx	9500		09/07/2008	09/13/2008	!	50.750 H	36 H	Approve All	
xxxxxx	Brett xxxxxx	9500		09/07	09/13/2008		40 H	40 H	Approve All	
xxxxxx	Gayle xxxxxx	9200		09/07/2			8 H	40 H	Approve All	
xxxxxx	Gayle xxxxxx	9500		09/07/2			33 H	40 H	Approve All	

On the **Weekly View - Without Charge Objects** screen, you can see how Gayle's 41 recorded hours came from 8 hours of A/A Type 9200, Sick Leave and 33 hours of 9500, Time Worked. Susan, another employee, has also recorded excess hours, but her total hours were recorded under 9500, Time Worked. Before discussing how to handle Gayle's and Susan's reported excess hours, let's review all of the basic components of this screen in more detail.

REVIEW <<BACK NEXT>>

The **Collective Approval** page in the Weekly View - Without Charge Objects displays all unapproved time your employees have submitted. It lists employee name, dates, hours worked and leave taken, and target hours.



Approve Time Sheet Data
1 Collective Approval
2 Review and Save
3 Completed

View: Weekly View - Without Charge Objects

Collective Approval

Employee	Empl./appl.name	A/A Type	Prem No	Frm	To	Message	Number	Target Time	Approval	RejectionReason
XXXXXX	Susan XXXXXX	9500		09/07/2008	09/13/2008	⚠	50.750 H	36 H	Approve All	
XXXXXX	Brett XXXXXX	9500		09/07/2008	09/13/2008		40 H	40 H	Approve All	
XXXXXX	Gayle XXXXXX	9200		09/07/2008	09/13/2008	⚠	8 H	40 H	Approve All	
XXXXXX	Gayle XXXXXX	9500		09/07/2008	09/13/2008	⚠	33 H	40 H	Approve All	

Previous Step
Review

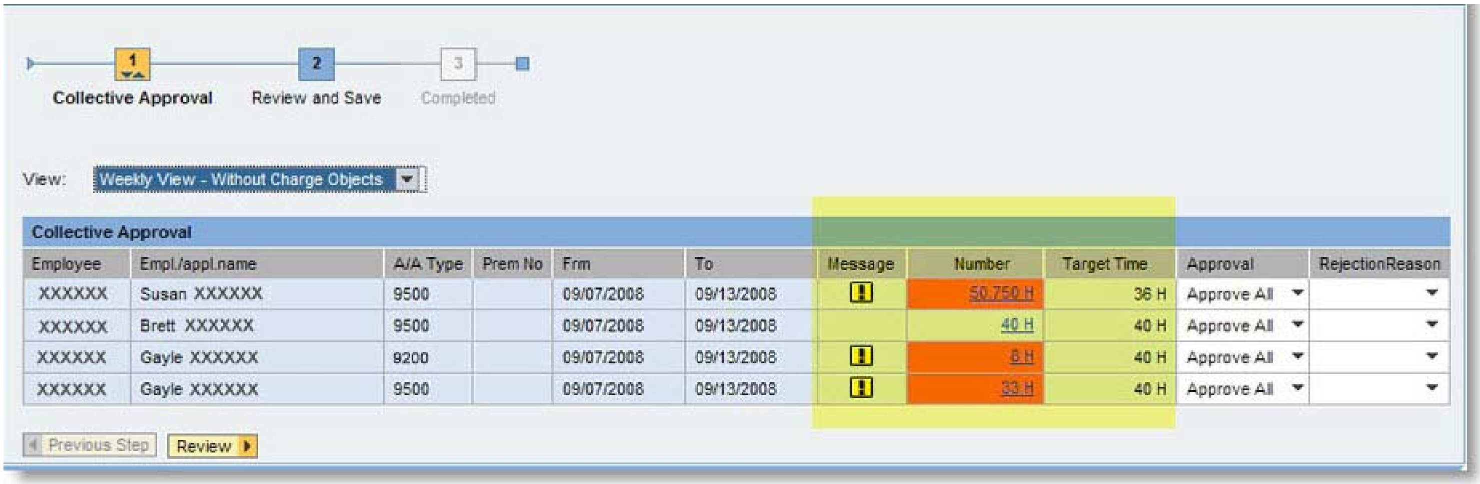
REVIEW

<<BACK

NEXT>>

The **Target Time** reflects the normal hours the employee works according to his or her work schedule.

- One employee worked his planned 40 hours
- Two employees worked more than their target hours, resulting in warning messages



View: Weekly View - Without Charge Objects

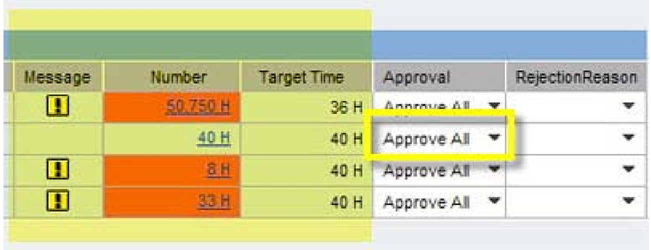
Collective Approval

Employee	Empl./appl.name	A/A Type	Prem No	Frm	To	Message	Number	Target Time	Approval	RejectionReason
XXXXXX	Susan XXXXXX	9500		09/07/2008	09/13/2008	!	50.750 H	36 H	Approve All	
XXXXXX	Brett XXXXXX	9500		09/07/2008	09/13/2008		40 H	40 H	Approve All	
XXXXXX	Gayle XXXXXX	9200		09/07/2008	09/13/2008	!	8 H	40 H	Approve All	
XXXXXX	Gayle XXXXXX	9500		09/07/2008	09/13/2008	!	33 H	40 H	Approve All	

REVIEW <<BACK NEXT>>

You Approve or Reject the employee’s submitted time by selecting the down arrows in the Approval column.

You can simply leave a row as **Approve All** if you want to approve all of the employee’s hours for the week.



Message	Number	Target Time	Approval	RejectionReason
!	50.750 H	36 H	Approve All	
	40 H	40 H	Approve All	
!	8 H	40 H	Approve All	
!	33 H	40 H	Approve All	

NOTE: **You may approve time sheets with leave recorded even if your employee did not use the leave request function in BEACON to get prior approval. For example, your employee may have told you or e-mailed you about a doctor's appointment but failed to complete a leave request through BEACON. Your approval of the leave in this time sheet approval process is the critical step that affects the time records rather than the leave request and approval function in BEACON.**

REVIEW

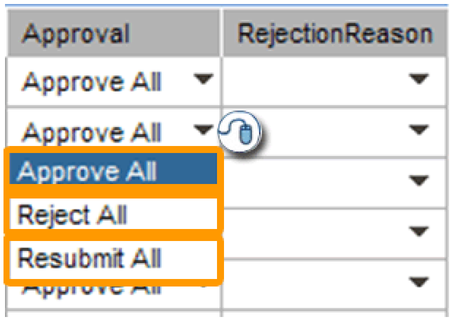
<<BACK NEXT>>

There are three options for approval:

- Approve All
- Reject All
- Resubmit All

Click each option in the drop-down menu to learn more.

Resubmit All: Select to resubmit all displayed time for the employee. This excludes the time data from being approved or rejected and will be available in the Approve Working Times service until processed.

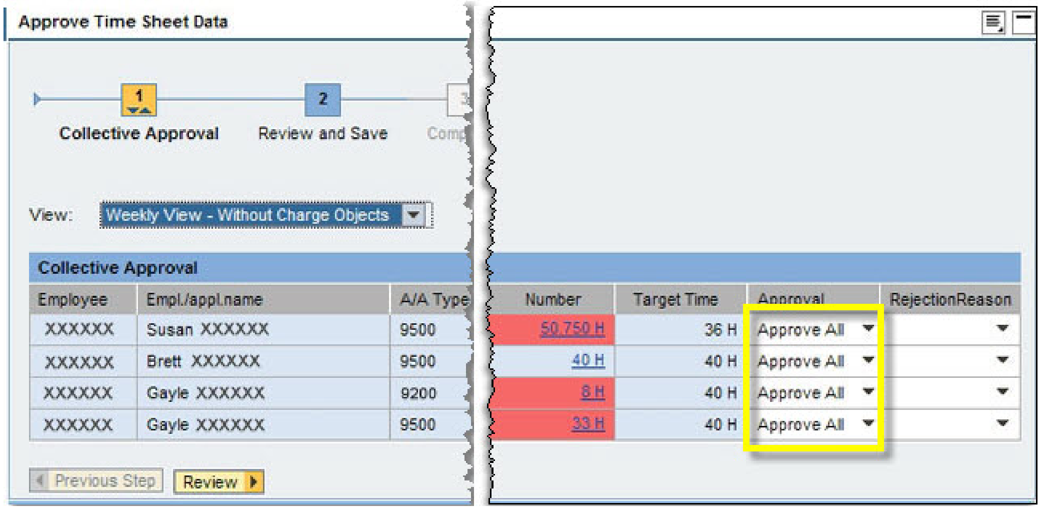

Approval
RejectionReason
Approve All
Approve All
Approve All
Reject All
Resubmit All
Approve All

REVIEW
<<BACK
NEXT>>

In this example, the manager is selecting **Approve All** for every employee. The manager is approving Brett's normal 40 hour week. She is also approving Susan's excess hours since they had previously discussed these extra hours.

Using the Weekly View Without Charge Objects, the manager verified that Gayle had taken sick leave one day and knew that she had stayed late to work one other day that week. So, the manager also approves Gayle's hours.

When **Time Evaluation** runs overnight in the system after manager approval, 1 hour will be returned to Gayle's Sick Leave balance and no Comp Time accrual or payment for extra hours will occur.



Approve Time Sheet Data

View: Weekly View - Without Charge Objects

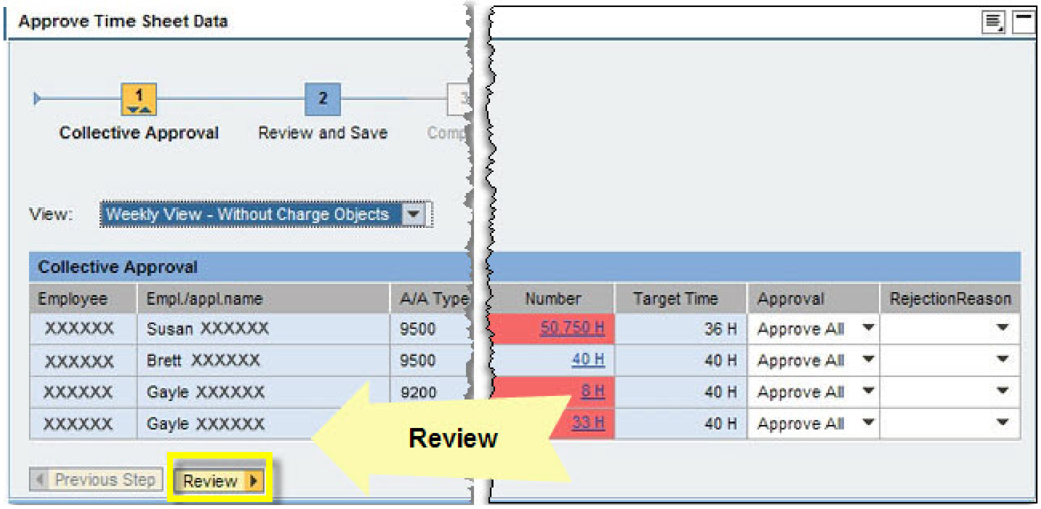
Collective Approval

Employee	Empl./appl.name	A/A Type	Number	Target Time	Approval	RejectionReason
XXXXXX	Susan XXXXXX	9500	50.750 H	36 H	Approve All	
XXXXXX	Brett XXXXXX	9500	40 H	40 H	Approve All	
XXXXXX	Gayle XXXXXX	9200	8 H	40 H	Approve All	
XXXXXX	Gayle XXXXXX	9500	33 H	40 H	Approve All	

Note: This screen has been spliced to display only the sections needed for this example.

REVIEW
<<BACK NEXT>>

After indicating your approval or rejection of the hours, click **Review**.



Approve Time Sheet Data

1
Collective Approval
2
Review and Save
3
Comp

View: Weekly View - Without Charge Objects

Collective Approval

Employee	Empl./appl.name	A/A Type	Number	Target Time	Approval	RejectionReason
XXXXXX	Susan XXXXXX	9500	50.750 H	36 H	Approve All	
XXXXXX	Brett XXXXXX	9500	40 H	40 H	Approve All	
XXXXXX	Gayle XXXXXX	9200	8 H	40 H	Approve All	
XXXXXX	Gayle XXXXXX		33 H	40 H	Approve All	

Previous Step
Review
Review

Note: This screen has been spliced to display only the sections needed for this example.

REVIEW
<<BACK
NEXT>>

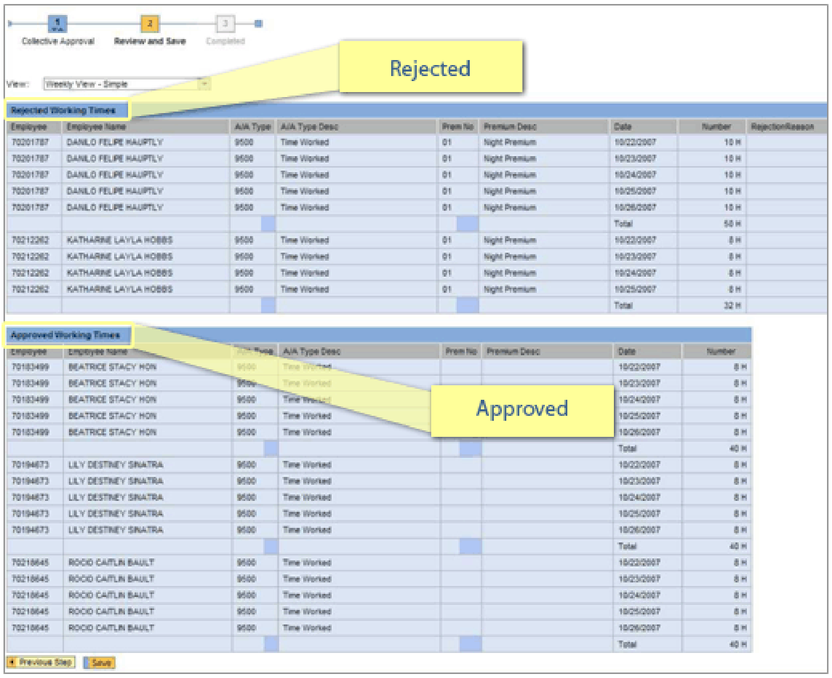
Approving Time Sheets

The **Review and Save** page displays.

The information is divided into **Rejected** and **Approved** time.

Even though the text on this large image is too small to read in detail, you can probably see that the **daily hours are listed for each employee on each row**. This will give you a thorough view of all approvals and rejections.

Since the last example had only approvals, this screen displays a larger example with five different employees. In this situation the manager rejected the time sheet of one employee who had recorded extra hours on a day that he was not scheduled to work. The manager thought that the other employee may have forgotten to record sick leave for a day that she was out. So, in this example, the manager **approved three employees' time sheets and rejected two**.



View: Weekly View - Simple

Rejected Working Times

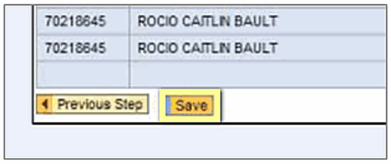
Employee	Employee Name	A/A Type	A/A Type Desc	Prem No	Premium Desc	Date	Number	RejectionReason
70201787	DANILO FELIPE HAUPTLY	9500	Time Worked	01	Night Premium	10/22/2007	10 H	
70201787	DANILO FELIPE HAUPTLY	9500	Time Worked	01	Night Premium	10/23/2007	10 H	
70201787	DANILO FELIPE HAUPTLY	9500	Time Worked	01	Night Premium	10/24/2007	10 H	
70201787	DANILO FELIPE HAUPTLY	9500	Time Worked	01	Night Premium	10/25/2007	10 H	
70201787	DANILO FELIPE HAUPTLY	9500	Time Worked	01	Night Premium	10/26/2007	10 H	
						Total	50 H	
70212262	KATHARINE LAYLA HOBBS	9500	Time Worked	01	Night Premium	10/22/2007	8 H	
70212262	KATHARINE LAYLA HOBBS	9500	Time Worked	01	Night Premium	10/23/2007	8 H	
70212262	KATHARINE LAYLA HOBBS	9500	Time Worked	01	Night Premium	10/24/2007	8 H	
70212262	KATHARINE LAYLA HOBBS	9500	Time Worked	01	Night Premium	10/25/2007	8 H	
						Total	32 H	

Approved Working Times

Employee	Employee Name	A/A Type	A/A Type Desc	Prem No	Premium Desc	Date	Number
70183499	BEATRICE STACY HON	9500	Time Worked			10/22/2007	8 H
70183499	BEATRICE STACY HON	9500	Time Worked			10/23/2007	8 H
70183499	BEATRICE STACY HON	9500	Time Worked			10/24/2007	8 H
70183499	BEATRICE STACY HON	9500	Time Worked			10/25/2007	8 H
70183499	BEATRICE STACY HON	9500	Time Worked			10/26/2007	8 H
						Total	40 H
70194673	LILY DESTINEY SINATRA	9500	Time Worked			10/22/2007	8 H
70194673	LILY DESTINEY SINATRA	9500	Time Worked			10/23/2007	8 H
70194673	LILY DESTINEY SINATRA	9500	Time Worked			10/24/2007	8 H
70194673	LILY DESTINEY SINATRA	9500	Time Worked			10/25/2007	8 H
70194673	LILY DESTINEY SINATRA	9500	Time Worked			10/26/2007	8 H
						Total	40 H
70218645	ROCIO CAITLIN BAULT	9500	Time Worked			10/22/2007	8 H
70218645	ROCIO CAITLIN BAULT	9500	Time Worked			10/23/2007	8 H
70218645	ROCIO CAITLIN BAULT	9500	Time Worked			10/24/2007	8 H
70218645	ROCIO CAITLIN BAULT	9500	Time Worked			10/25/2007	8 H
70218645	ROCIO CAITLIN BAULT	9500	Time Worked			10/26/2007	8 H
						Total	40 H

REVIEW
<<BACK
NEXT>>

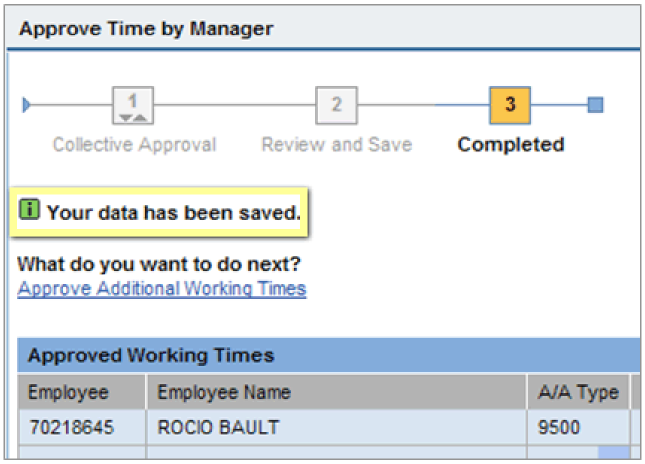
Review the data and press **Save** at the bottom of the page.


70218645
ROCIO CAITLIN BAULT
70218645
ROCIO CAITLIN BAULT
Previous Step
Save

The **Completed** page displays with a confirmation message indicating your data was saved.

Your employees will see the status of their time sheet data the next time they log in to ESS and go to the **Record Working Time** service.

NOTE: You should also contact the employee to resolve any time submission issues.


Approve Time by Manager
1
Collective Approval
2
Review and Save
3
Completed

Your data has been saved.

What do you want to do next?

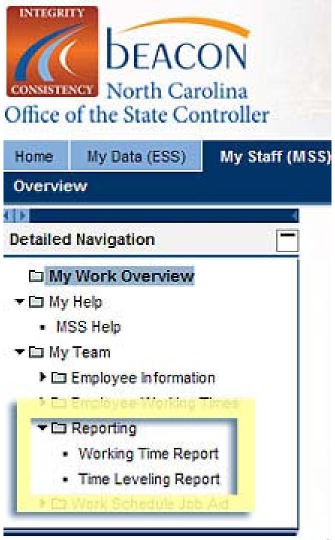
Approve Additional Working Times

Approved Working Times

Employee	Employee Name	A/A Type
70218645	ROCIO BAULT	9500

You may find the following reports useful in monitoring your employees' time sheet submissions, approvals, and statistics or trends.

- **Working Time Report:**
    - Monitor all working times entered into ESS by your direct report employees
    - Identify time that has been saved, but not yet submitted for approval
    - Identify rejected times that need to be corrected/resubmitted by the employee
    - Reconcile previously approved times
    - Monitor by Attendance or Absence type such as sick time
- **Time Leveling Report** to identify employees with the following:
    - Missing time
    - Hours less than their target hours
    - Hours more than their target hours


INTEGRITY
BEACON
CONSISTENCY
North Carolina
Office of the State Controller
Home
My Data (ESS)
My Staff (MSS)
Overview
Detailed Navigation
My Work Overview
My Help
MSS Help
My Team
Employee Information
Employee Working Times
Reporting
Working Time Report
Time Leveling Report
Work Schedule Job Aid

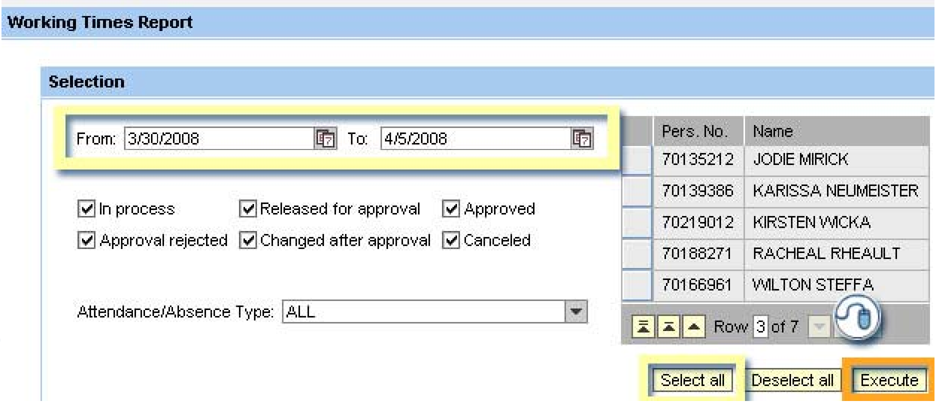
This screen illustrates the **menu path** to access these reports. To start, let's say that you clicked on the **Working Time Report** on the menu.

Note: Each report opens in a second window so you can resize it, move it, or click back and forth easily from the report to your other open screen.

Click **Next** to continue.

After selecting the **Working Times Report** from the menu, this Selection screen displays. Here you can select some **parameters** to specify the **type of data** you want and the **time span** of the report. It **defaults** to:

- The **current work week** in the From and To dates
- **All options** checked
  - In process
  - Released for approval
  - Approved
  - Approval rejected
  - Changed after approval
  - Canceled
- **Attendance/Absence Type** defaults to **ALL** but you may select other options.



Working Times Report

Selection

From: 3/30/2008 To: 4/5/2008

☑ In process ☑ Released for approval ☑ Approved
☑ Approval rejected ☑ Changed after approval ☑ Canceled

Attendance/Absence Type: ALL

Pers. No.	Name
70135212	JODIE MIRICK
70139386	KARISSA NEUMEISTER
70219012	KIRSTEN WICKA
70188271	RACHEAL RHEAULT
70166961	WILTON STEFFA

Row 3 of 7

If this is exactly what you want in the report, you may leave all of the default choices selected and then click the **Select All** button to include information on all of your employees. You may also click on individual employees by holding the **CTRL key** as you select each one.

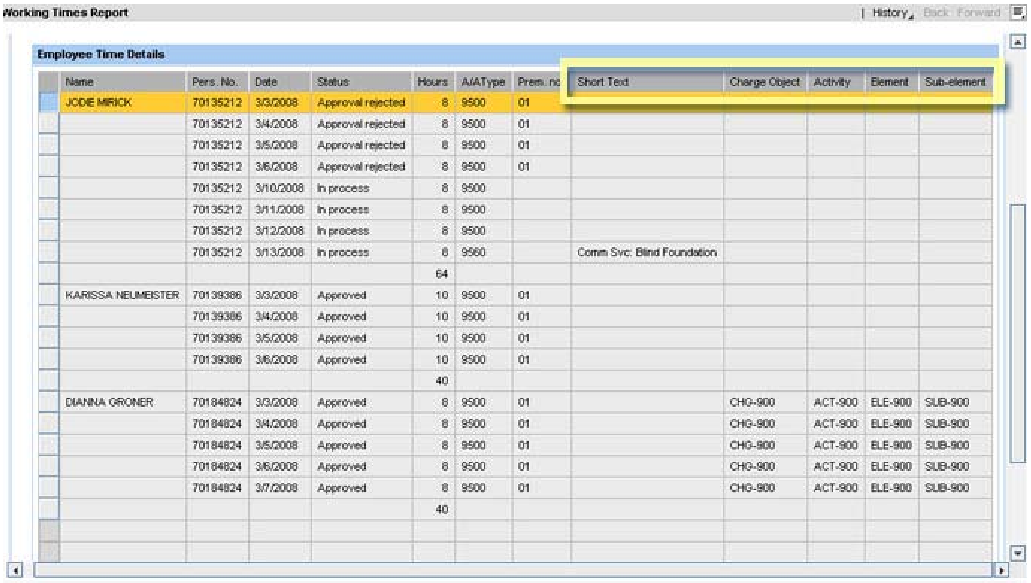
Click the Execute button now to see this report showing all default selections and all employees.

This is an excerpt of the Working Times Report screen, showing three employees' information.

The column headers on the left side of the screen are self-explanatory.

Note the following descriptions for the other columns:

- **Short Text** - first 40 characters of any notes entered by the employee
- **Charge Object, Activity, Element, Sub-element** - all related to employees who record their time with Charge Objects, generally those paid through special funds, grants, or programs



Working Times Report

Employee Time Details

Name	Pers. No.	Date	Status	Hours	A/AType	Prem. no	Short Text	Charge Object	Activity	Element	Sub-element
JODIE MIRICK	70135212	3/3/2008	Approval rejected	8	9500	01					
	70135212	3/4/2008	Approval rejected	8	9500	01					
	70135212	3/5/2008	Approval rejected	8	9500	01					
	70135212	3/6/2008	Approval rejected	8	9500	01					
	70135212	3/10/2008	In process	8	9500						
	70135212	3/11/2008	In process	8	9500						
	70135212	3/12/2008	In process	8	9500						
	70135212	3/13/2008	In process	8	9560		Comm Svc: Blind Foundation				
				64							
KARISSA NEUMEISTER	70139386	3/3/2008	Approved	10	9500	01					
	70139386	3/4/2008	Approved	10	9500	01					
	70139386	3/5/2008	Approved	10	9500	01					
	70139386	3/6/2008	Approved	10	9500	01					
				40							
DIANNA GRONER	70184824	3/3/2008	Approved	8	9500	01		CHG-900	ACT-900	ELE-900	SUB-900
	70184824	3/4/2008	Approved	8	9500	01		CHG-900	ACT-900	ELE-900	SUB-900
	70184824	3/5/2008	Approved	8	9500	01		CHG-900	ACT-900	ELE-900	SUB-900
	70184824	3/6/2008	Approved	8	9500	01		CHG-900	ACT-900	ELE-900	SUB-900
	70184824	3/7/2008	Approved	8	9500	01		CHG-900	ACT-900	ELE-900	SUB-900
				40							

Click **Next** to learn about the other report: **Time Leveling Report**.

REVIEW

<<BACK NEXT>>

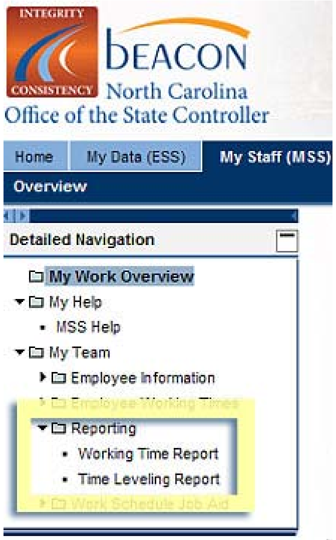
You will follow the **same path** illustrated here that you used for the Working Time report to get to the **Time Leveling Report**.

Remember, the **Time Leveling Report** identifies employees with the following:

- Missing time
- Hours less than their target hours
- Hours more than their target hours

To start, let's say that you have clicked on the **Time Leveling Report** on the menu.

Click **Next** to see the first screen.


INTEGRITY
CONSISTENCY
BEACON
North Carolina
Office of the State Controller
Home
My Data (ESS)
My Staff (MSS)
Overview
Detailed Navigation
My Work Overview
My Help
MSS Help
My Team
Employee Information
Employee Working Times
Reporting
Working Time Report
Time Leveling Report
Work Schedule Job Aid

REVIEW

<<BACK

NEXT>>

The **Time Leveling Report** Selection screen displays. Here you can select some **parameters** to specify the **type of data** you want and the **time span** of the report.
It **defaults** to:

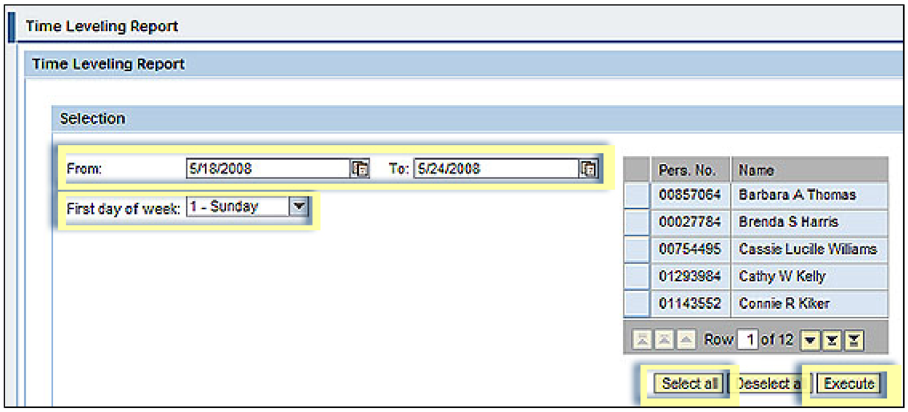
- The **current work week**
- **Sunday** in the **First Day of the Week** field

Work Week Dates: Select another work week by typing different **From** and **To** dates or using the calendar.

First Day of Week: If your employees report time based on a different schedule such as Saturday through Friday, select a start day from the drop-down box.

Employee Selection: You may click on the **Select All** button to run the report for all of your employees. Or to run the report on select employees, hold the **CTRL key** as you click **each employee's name.**

Execute: Click on the **Execute** button to run the report.



Time Leveling Report

Time Leveling Report

Selection

From: 5/18/2008 To: 5/24/2008

First day of week: 1 - Sunday

Pers. No.	Name
00857064	Barbara A Thomas
00027784	Brenda S Harris
00754495	Cassie Lucile Williams
01293984	Cathy W Kelly
01143552	Connie R Kiker

Row 1 of 12

Click **Next** to see how the report displays.

REVIEW

<<BACK NEXT>>

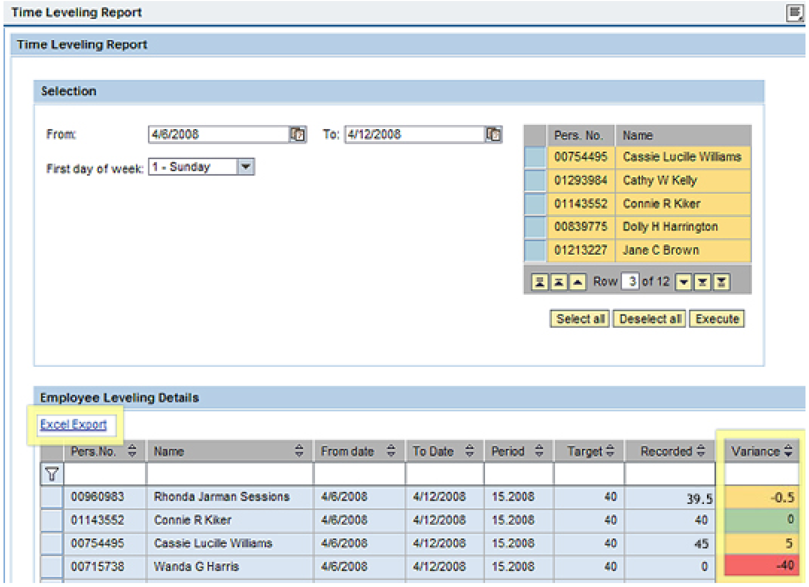
This **Time Leveling Report** excerpt displays four employees' data. Note the following colors and numeric formats in the **Variance column**:

- **GREEN** - no variance from target hours
- **YELLOW - ** any variance, more than or less than target hours
  - Minus sign for below target
  - Whole number for exceeds target
- **RED** - missing time with 0 recorded hours

In this **example**, all four of these employees had 40-hour target weeks with the following Variants results:

- Rhonda recorded less than 40 hours
- Connie recorded her expected 40 hours
- Cassie recorded more than 40 hours
- Wanda failed to record any hours for the week

NOTE: Click the Excel Export option highlighted on this screen to save the report to your own computer.



Time Leveling Report

Time Leveling Report

Selection

From: 4/6/2008 To: 4/12/2008

First day of week: 1 - Sunday

Pers. No.	Name
00754495	Cassie Lucille Williams
01293984	Cathy W Kelly
01143552	Connie R Kiker
00839775	Dolly H Harrington
01213227	Jane C Brown

Row 3 of 12

Employee Leveling Details

Excel Export

Pers.No.	Name	From date	To Date	Period	Target	Recorded	Variance
00960983	Rhonda Jarman Sessions	4/6/2008	4/12/2008	15.2008	40	39.5	-0.5
01143552	Connie R Kiker	4/6/2008	4/12/2008	15.2008	40	40	0
00754495	Cassie Lucille Williams	4/6/2008	4/12/2008	15.2008	40	45	5
00715738	Wanda G Harris	4/6/2008	4/12/2008	15.2008	40	0	-40

Click **NEXT** to continue.

REVIEW

<<BACK NEXT>>

You have completed the **Approving TIme Sheets** lesson.

You should now be able to:

- Approve employee time sheets using MSS
- Access Time related reports to monitor and manage employee time approvals, errors, pending, and missing time sheets.

Click on Lesson 6, Creating Shift Substitutions to continue, if you supervise shift employees.

If not, click **Next** to continue.

REVIEW <<BACK NEXT>>

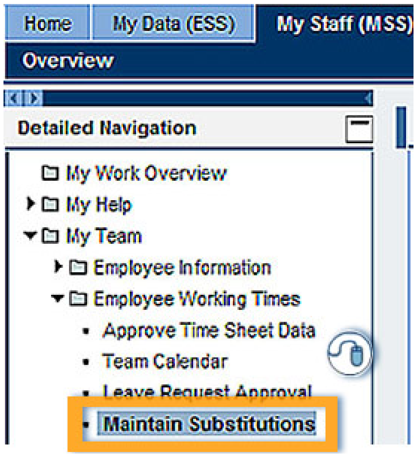
Lesson 6: Creating Shift Substitutions

Upon completion of the **Creating Shift Substitutions** lesson, you should be able to:

- Create a substitution record in SAP to allow one employee to substitute for another on a different shift and receive the correct pay rate such as shift premium pay
- Maintain and update the substitution record as necessary

REVIEW

<<BACK NEXT>>


Home
My Data (ESS)
My Staff (MSS)
Overview
Detailed Navigation
My Work Overview
My Help
My Team
Employee Information
Employee Working Times
Approve Time Sheet Data
Team Calendar
Leave Request Approval
Maintain Substitutions

When one employee works a **higher-paid shift** for another employee, the substitute employee is paid at the **same shift rate** as the regularly assigned employee for **all hours worked in that 24-hour period**. This substitution procedure also applies to assigning an employee to a higher paid shift for a long term period of several months, for example, or temporarily to a position that is vacant.

Note: These substitutions have an **end date**. For permanent changes to an employee's shift, contact your HR office so that they can make a permanent change to the employee's record.

To assure that the **substitute employee is paid correctly**, the employee's line supervisor must create a substitution record that assigns the higher pay rate to the substitute employee temporarily. Before getting started, **you must know the regular employee's work schedule** to select the proper work schedule code for the shift dates you need to fill. You will see a Job Aid later in the lesson for help with selecting the correct code.

To create a substitution record for an employee, you would start by using the path illustrated on this screen. Within MSS, select:

- My Team
- Employee Working Times
- Maintain Substitutions

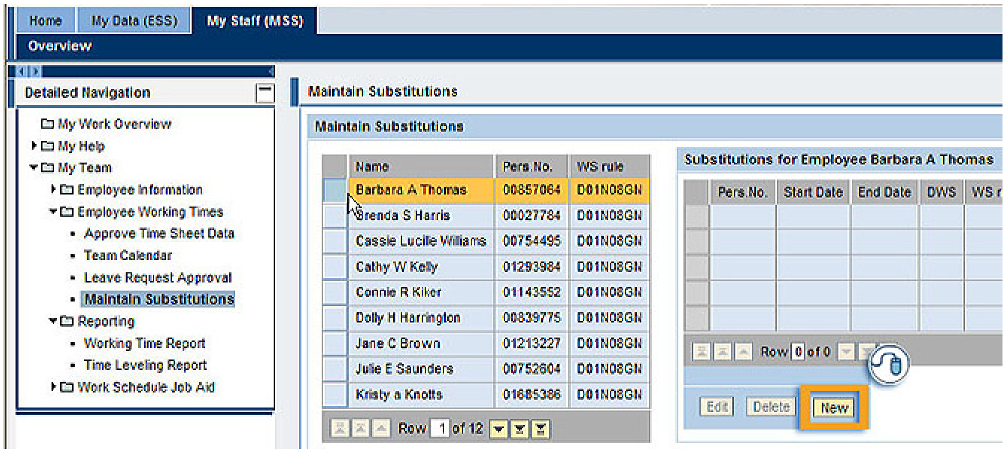
Click on the highlighted Maintain Substitutions selection above to get to the screen.

REVIEW
<<BACK NEXT>>

The **Maintain Substitutions** screen displays a list of all of your **Direct Report** employees. You would then **select the employee who will be substituting** for another employee's shift on one or more days and then click the **New Button**.

For this **example**, Barbara Thomas, who usually works part-time on the day-shift Mondays and Wednesdays only, will switch to the night shift for the summer beginning May 13th. She will also work a night shift in addition to her regular part-time day on Monday, May 5th for another employee.

She will work Cathy Kelly's night shifts on Tuesdays, Thursdays, Saturdays, and Sundays for most of the summer beginning May 13th and fill in for Julie Saunders' Monday night shift on May 5th.


Home
My Data (ESS)
My Staff (MSS)
Overview
Detailed Navigation
My Work Overview
My Help
My Team
Employee Information
Employee Working Times
Approve Time Sheet Data
Team Calendar
Leave Request Approval
Maintain Substitutions
Reporting
Working Time Report
Time Leveling Report
Work Schedule Job Aid
Maintain Substitutions
Maintain Substitutions
Row 1 of 12
Substitutions for Employee Barbara A Thomas
Pers.No.
Start Date
End Date
DWS
WS r
Row 0 of 0
Edit
Delete
New

Name	Pers.No.	WS rule
Barbara A Thomas	00857064	D01N08GN
Brenda S Harris	00027784	D01N08GN
Cassie Lucille Williams	00754495	D01N08GN
Cathy W Kelly	01293984	D01N08GN
Connie R Kiker	01143552	D01N08GN
Dolly H Harrington	00839775	D01N08GN
Jane C Brown	01213227	D01N08GN
Julie E Saunders	00752604	D01N08GN
Kristy a Knotts	01685386	D01N08GN

You have selected Barbara Thomas on the screen, so click the **New button** now to see how the right section of the screen changes.

REVIEW <<BACK NEXT>>

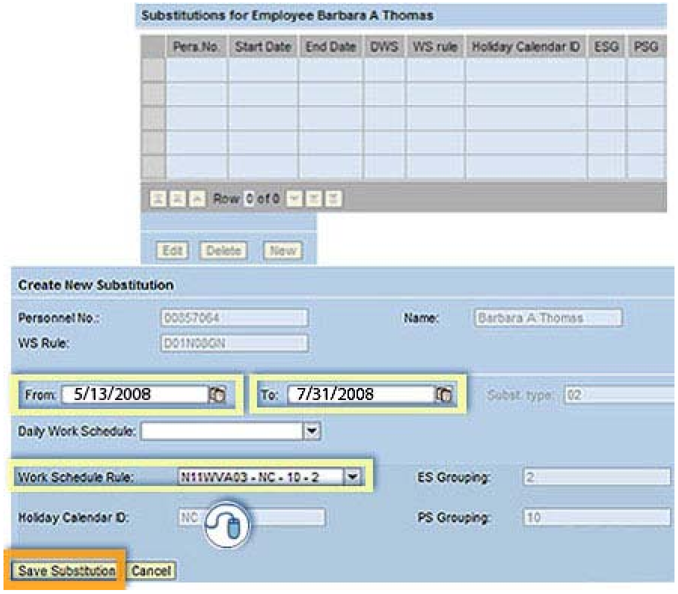
Create New Substitution

The lower portion of the screen displays with dates and work schedule fields to complete. You will choose one of the following:

- **Daily Work Schedule** for one-day substitutions, including multiple days in a row or at intervals over a number of weeks
- **Work Schedule Rule** for long term continuous substitutions, such as four or more weeks in a row

In this **example since we are working on setting up the long-term substitution first**, let's say that you have completed the **To and From date** fields for May 13th to July 31st, the summer weeks that Barbara will work the night shift for Cathy Kelly. You have also selected the correct code for Cathy's work schedule from the drop-down list in **Work Schedule Rule**.

NOTE: In the **Work Schedule Rule From** date field, when changing an employee's work schedule for a **business need**, use the first date that the employee will begin the substitution regardless of where this date falls in the work week or pay period. If the change is due to an **employee request** instead, e.g., changing shifts over the summer months to accommodate child care needs, make the change effective the first day of the next pay period.



Substitutions for Employee Barbara A Thomas

	Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG

Row 0 of 0

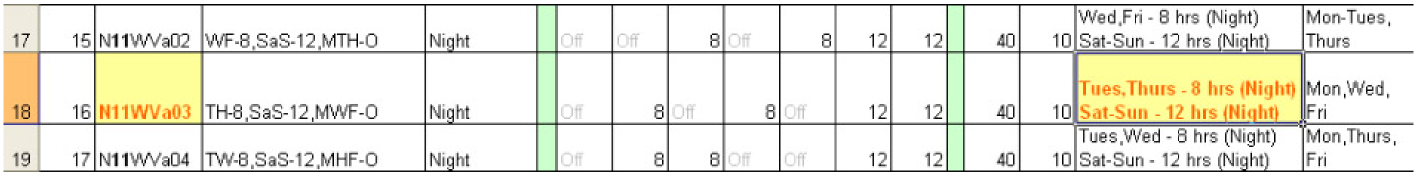
Create New Substitution

Personnel No.: 00857064
Name: Barbara A Thomas
WS Rule: D01N08GN
From: 5/13/2008
To: 7/31/2008
Subst. type: 02
Daily Work Schedule:
Work Schedule Rule: N11WVA03 - NC - 10 - 2
ES Grouping: 2
Holiday Calendar ID: NC
PS Grouping: 10

Click **Save Substitution** now.

Job Aid:

For assistance with selecting the correct **weekly** work schedule codes for the employee who needs coverage, you can click on the **Help link** at the top right of the screen and then select **HR folder**, **Time**, and then click on the **Work_Schedule_JobAid**. The Job Aid excerpt below shows where you would find the code and the schedule for Cathy Kelly in our example.



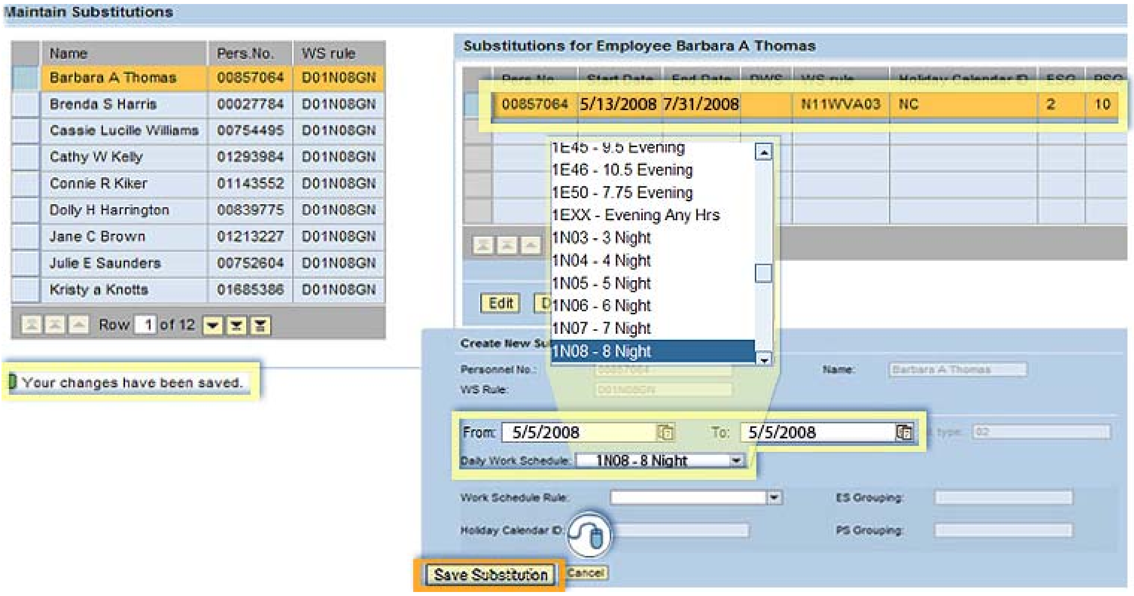
17	15	N11WVa02	WF-8,SaS-12,MTH-O	Night		Off	Off	8	Off	8	12	12		40	10	Wed,Fri - 8 hrs (Night) Sat-Sun - 12 hrs (Night)	Mon-Tues, Thurs
18	16	N11WVa03	TH-8,SaS-12,MWF-O	Night		Off	8	Off	8	Off	12	12		40	10	Tues,Thurs - 8 hrs (Night) Sat-Sun - 12 hrs (Night)	Mon,Wed, Fri
19	17	N11WVa04	TW-8,SaS-12,MHF-O	Night		Off	8	8	Off	Off	12	12		40	10	Tues,Wed - 8 hrs (Night) Sat-Sun - 12 hrs (Night)	Mon,Thurs, Fri

Click **Next** to continue.

REVIEW
<<BACK
NEXT>>

After clicking on **Save Substitution** for May 13th to July 31st, the substitution data and the message "Your changes have been saved" are now displayed.

To set Barbara up to substitute for Julie's **Monday night shift on May 5th**, you have clicked on **New** again and completed the **From and To fields** for **May 5th**. Notice that you selected the code for Julie's **Daily Work Schedule** (night shift, 8 hours) rather than the Work Schedule Rule since this substitution record is for only one day.



Maintain Substitutions

Name	Pers.No.	WS rule
Barbara A Thomas	00857064	D01N08GN
Brenda S Harris	00027784	D01N08GN
Cassie Lucille Williams	00754495	D01N08GN
Cathy W Kelly	01293984	D01N08GN
Connie R Kiker	01143552	D01N08GN
Dolly H Harrington	00839775	D01N08GN
Jane C Brown	01213227	D01N08GN
Julie E Saunders	00752604	D01N08GN
Kristy a Knotts	01685386	D01N08GN

Row 1 of 12

Your changes have been saved.

Substitutions for Employee Barbara A Thomas

Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG
00857064	5/13/2008	7/31/2008		N11WVA03	NC	2	10

1E45 - 9.5 Evening
1E46 - 10.5 Evening
1E50 - 7.75 Evening
1EXX - Evening Any Hrs
1N03 - 3 Night
1N04 - 4 Night
1N05 - 5 Night
1N06 - 6 Night
1N07 - 7 Night
1N08 - 8 Night
Edit

Create New Su

Personnel No.:

Name: Barbara A Thomas

WS Rule:

From: 5/5/2008 To: 5/5/2008

Daily Work Schedule: 1N08 - 8 Night

Work Schedule Rule:

ES Grouping:

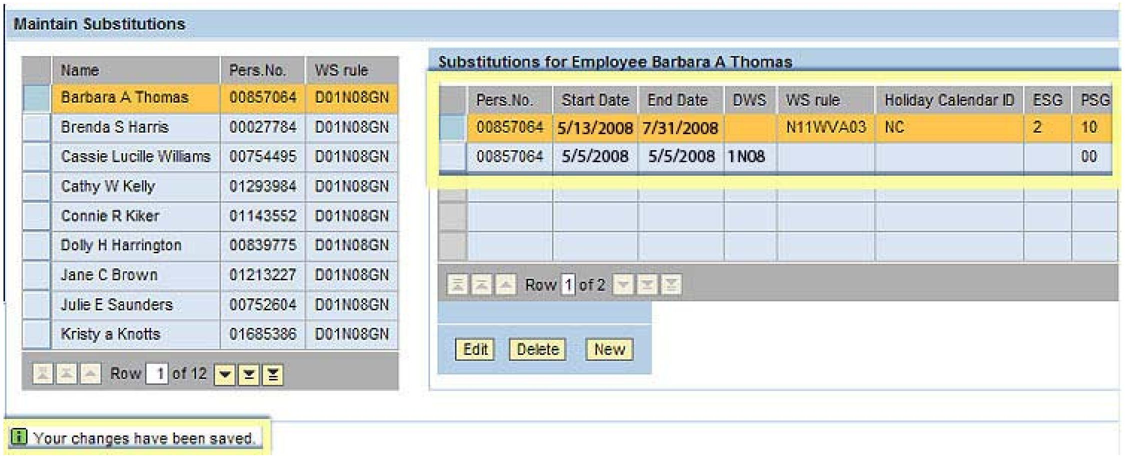
Holiday Calendar ID:

PS Grouping:

Save Substitution
Cancel

Click on **Save Substitution** to continue.

Once again, note the message, "**Your changes have been saved**" at the bottom of the screen. The two substitutions now appear on the screen for the May 13th through July 31st shifts as well as the May 5th shift. Remember, Barbara's pay will revert back to the day-shift rate after July 31st unless you go back in to the Maintain Substitutions screen to make the adjustment.



Maintain Substitutions

Name	Pers.No.	WS rule
Barbara A Thomas	00857064	D01N08GN
Brenda S Harris	00027784	D01N08GN
Cassie Lucille Williams	00754495	D01N08GN
Cathy W Kelly	01293984	D01N08GN
Connie R Kiker	01143552	D01N08GN
Dolly H Harrington	00839775	D01N08GN
Jane C Brown	01213227	D01N08GN
Julie E Saunders	00752604	D01N08GN
Kristy a Knotts	01685386	D01N08GN

Substitutions for Employee Barbara A Thomas

Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG
00857064	5/13/2008	7/31/2008		N11WVA03	NC	2	10
00857064	5/5/2008	5/5/2008	1N08				00

Your changes have been saved.

Click **Next** to continue.

REVIEW
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NEXT>>

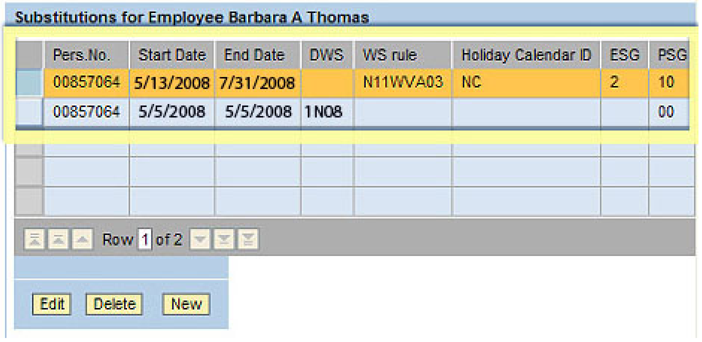
Create New Substitution

IMPORTANT NOTES:

For most substitutions, you will use the Daily Work Schedule option rather than the Work Schedule Rule.

For long-term substitutions, the Work Schedule Rule selected determines the substitute employee's pay rate for all hours worked in each 24-hour period within the From and To dates.

For example, if one of your employees will be substituting for another employee on the night shift or weekend days at a higher pay rate for two weeks in a row on Wednesdays, Fridays, and Saturdays, you would create six separate **daily substitution records** since this is not a long-term continuous substitution.



Substitutions for Employee Barbara A Thomas

Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG
00857064	5/13/2008	7/31/2008		N11WVA03	NC	2	10
00857064	5/5/2008	5/5/2008	1N08				00

In our previous example, if Barbara works her regular part-time hours during the day on Monday, May 5th, and comes back to work the night-shift that Monday night, she will be paid at the higher rate for all hours on Monday, May 5th. This extra pay is correct for Monday, but you should **make sure that the substitution dates do not span any other days when the substitute employee is not scheduled to work the extra higher-paid shift.** In this example, we made sure that the begin and end date for the one-day substitution was May 5th so Barbara will get paid her regular daily part-time rate for Wed., May 7th and Monday, May 12th, her last two days on day shift for the summer. We created a separate substitution with the begin date of May 13th for her long-term summer switch to night shift.

Click **Next** to continue.

REVIEW
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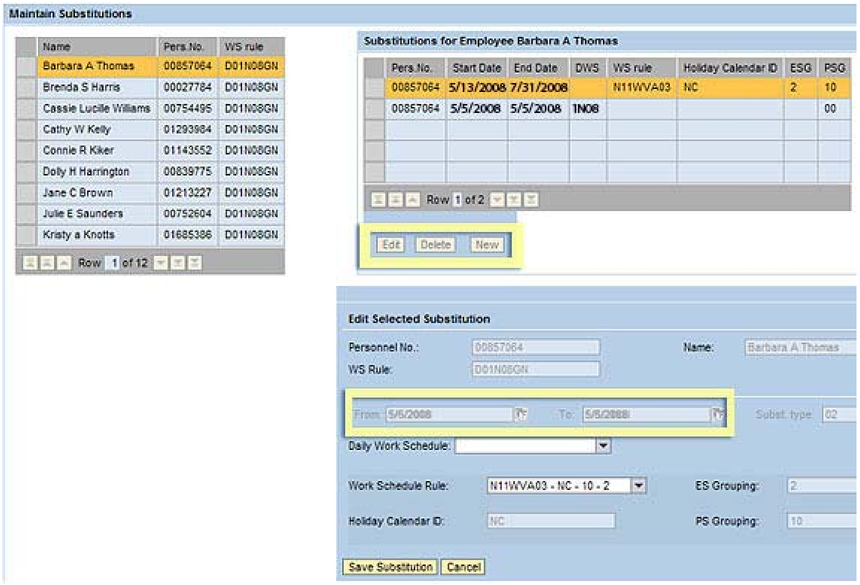
NEXT>>

Notice the three options at the bottom of the Employee Substitutions area of the screen:

- Edit
- Delete
- New

In this example, we clicked on **Edit** which allows you to make **changes to the Work Schedule options** in the new **Edit Selected Substitutions** section. Note also that the dates are grayed-out in the edit section. **To change dates**, you must use the **Delete** button instead and after completing the deletion process, select **New** to create a new record.

You must also use the **Delete** button to **cancel any future payments at the higher rate** if the employee will not be working a shift as originally planned. If you find out after the scheduled substitution date that the employee **did not work the shift, use Delete** to delete the record, but you may have to deal with an overpayment if the incorrect payment was processed.



Maintain Substitutions

Name	Pers.No.	WS rule
Barbara A Thomas	00857064	D01N08GN
Brenda S Harris	00027784	D01N08GN
Cassie Lucille Williams	00754495	D01N08GN
Cathy W Kelly	01293984	D01N08GN
Connie R Kiker	01143552	D01N08GN
Dolly H Harrington	00839775	D01N08GN
Jane C Brown	01213227	D01N08GN
Julie E Saunders	00752604	D01N08GN
Kristy a Knotts	01685386	D01N08GN

Row 1 of 12

Substitutions for Employee Barbara A Thomas

Pers.No.	Start Date	End Date	DWS	WS rule	Holiday Calendar ID	ESG	PSG
00857064	5/13/2008	7/31/2008		N11WVA03	NC	2	10
00857064	5/5/2008	5/5/2008	1N08				00

Row 1 of 2

Edit Selected Substitution

Personnel No.: 00857064
Name: Barbara A Thomas
WS Rule: D01N08GN
From: 5/5/2008
To: 5/5/2008
Subst. type: 02
Daily Work Schedule:
Work Schedule Rule: N11WVA03 - NC - 10 - 2
ES Grouping: 2
Holiday Calendar ID: NC
PS Grouping: 10

Click **Next** to continue.

BEACON
North Carolina
Office of the State Controller

Home | Menu | Exit Manager Self-Service

Knowledge Check **Lesson 6**

Using your mouse, select the correct answer for each question, then click the Submit button.

Create a substitution record on an employee who will be missing a shift so that others may substitute.

☐ True
☐ False

Submit Reset

An employee who substitutes on a higher paid shift as well as working a regular shift in the same 24-hour period is paid at the higher pay rate for both shifts.

☐ True
☐ False

Submit Reset

In creating a substitution record, you should use the Work Schedule Rule to span a week if an employee is working his regular shift on Tuesday and Thursday and substituting on Monday, Wednesday and Friday.

☐ True
☐ False

Submit Reset

If you need to change the dates on a substitution, use the Edit button to make the change.

☐ True
☐ False

Submit Reset

REVIEW <<BACK NEXT>>

You have completed the **Creating Shift Substitutions** lesson.

You should now be able to:

- Create a substitution record in SAP to allow one employee to substitute for another on a different shift and receive the correct pay rate such as shift premium pay
- Maintain and update the substitution record as necessary

Click **Next** to continue.

REVIEW <<BACK NEXT>>

Course Summary

You have completed the Manager Self Service course.

You should have learned to:

- Log on and navigate Manager Self Service (MSS)
- View employee information
- View the Reminder of Dates service
- Find help working with MSS

If you are a manager who approves leave time and time sheets or supervises shift employees, you should be able to:

- Review and approve leave requests
- Review and approve time sheets
- Create and maintain shift substitutions

REVIEW <<BACK NEXT>>

Simulations

Use these simulations to practice using MSS to approve hours and leave requests for your team.

Click a link below to launch the simulation in a new window. When you have finished the simulation, close its browser window to return to this screen.

Note: The Resite Simulation Player is required to view the supplemental simulations. If you cannot view the simulations, you can download the player directly by clicking the link below. You may need assistance from your IT support group to install the file.

Resite Simulation Player

Approve My Team's Hours

The Approve Working Times service is located in the 'My Team' Workset in MSS. At the end of the period, employees will need to submit their time for approval. Managers are unable to approve any time until the employee submits it.

Approve My Team's Leave Requests

When an employee submits a Leave Request from ESS, a notification is triggered and sent to the manager. The manager must process (approve or reject) the leave request. Tracking team absences will assist the manager with staffing and planning.

REVIEW

<<BACK NEXT>>

Congratulations!

You have completed the Manager Self Service Course.

REVIEW

<<BACK

EXIT

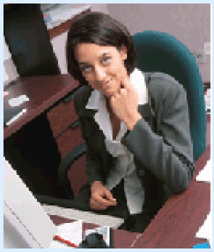
After completing the course, you may use this menu to go directly to any topics you would like to review. To return to this menu, click the REVIEW button at the bottom of any course screen. If you have not yet completed the full course, click the BACK button below to return to the course.

Note: Set your Screen Resolution to 1024 X 768 and use Full Screen View. [Instructions]

Lesson 1: MSS Overview

- GO Line Supervisor Designation
- GO Logging In
- GO Universal Worklist
- GO Reminder of Dates

Lesson 2: My Team



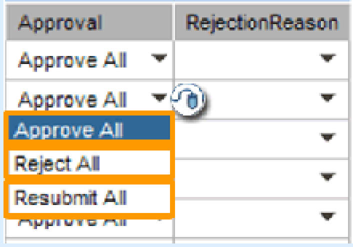
- GO Getting Started
- GO Employee Information
- GO Team Calendar

Lesson 3: Finding Help

- GO Resources

Lesson 4: Approving Leave Requests

- GO Checking Universal Worklist
- GO Checking Requests Through Menu
- GO Approving a Leave Request
- GO Rejecting a Leave Request



Lesson 5: Approving Time Sheets

- GO Getting Started and Link to Guide
- GO Collective Approval
- GO Approve, Reject, Resubmit Options
- GO Example
- GO Reviewing and Saving
- GO Employee Notification
- GO Time Related Reports Introduction
- GO Working Time Report
- GO Time Leveling Report

Lesson 6: Creating Shift Substitutions

- GO Basic Rules and Accessing Screen
- GO Substitution Examples
- GO Work Schedule Job Aid
- GO Important Notes

<<BACK